

ProcServe



**Zanzibar User Manual
Release 4.6**



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Printed: July 2012
Software Version: 4.6.0

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1

About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the Zanzibar system effectively.

Who is ProcServe?

ProcServe is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. ProcServe particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does ProcServe offer?

- ProcServe offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The ProcServe solutions are a blend of world-class application Commerce Modules, all hosted and managed by ProcServe, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The ProcServe Commerce Network

ProcServe offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, ProcServe implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. ProcServe also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

2

Zanzibar Buyer Portal

2 Zanzibar Buyer Portal

2.1 Getting Started

2.1.1 Logging in to the ProcServe Trading Network

Overview

This describes how you access and login to the ProcServe Commerce Network.

Pre-Requisites

In order to access the ProcServe Commerce Network you will need a username and password. Your username and password will be emailed to you. If you do not have this information please contact your local administrators.

Locating the ProcServe home page

The following list describes how you access and login to the ProcServe Commerce Network:

1. Browse to <http://www.procserve.com/>.
2. The ProcServe home page is displayed:
3. Click the customer login button (top right) in the main navigation bar:



4. The customer login page is displayed:

5. Click the Zanzibar logo:

Home Our Solutions & Services Our Customers News & Events Library Join Our Team About Us Contact Us **Customer Login**

Customer Login
ProcServe P2P

Next Steps
[Contact Me](#)
[Request a Demo](#)
[Sign Up for News](#)
[Library](#)
[Become A Partner](#)

[Home / Customer Login](#)

Customer Login

ProcServe ProcServe P2P OTIS

Zanzibar OPEN cyfnewidymru xchangelwales e Fasnachu Trading

cyfnewidymru xchangelwales e Fasnachu Trading for Schools pfh PROCUREMENT FOR HOUSING

[Print](#) [Forward](#) [PDF version](#) [News Feed](#)

Customer Support

Buying Organisations
Proc Serve
+44(0)845 603 6727 or [email](#)

Zanzibar
+44(0) 845 603 2885 or [email](#)

OPEN
+44 (0) 845 600 6736 or [email](#)

xchangelwales eTrading
+44 (0)845 602 9802 or [email](#)

xchangelwales eTrading for Schools
+44 (0)845 602 9803 or [email](#)

Procurement for Housing
+44(0)845 864 5299 or [email](#)

Supplier Organisations
+44(0)845 604 2328 or [email](#)

2.1.2 ProcServe Commerce Network Home Page

Overview

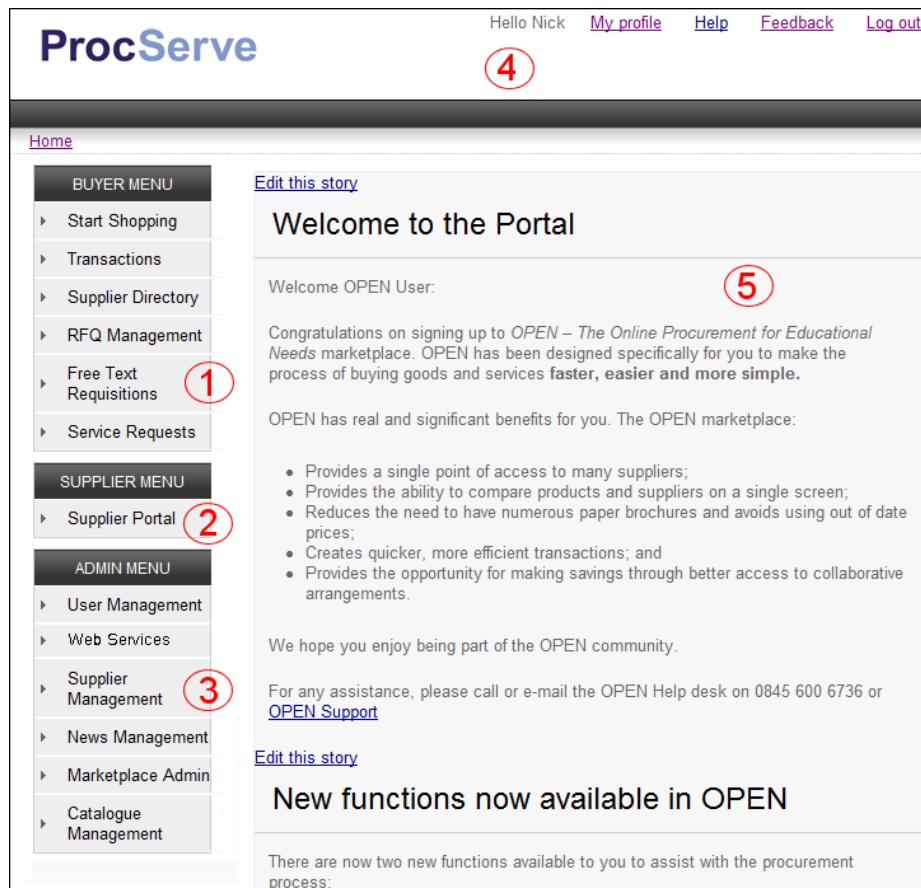
The ProcServe Portal home page is displayed once you are logged into the ProcServe Commerce Network.

The Home page allows you to access the ProcServe Commerce Network features. You can also access your user profile, get help, provide feedback and log out.

Note: The Home page you see may be different depending on which features you are authorised to use.

The ProcServe Portal Home Page

The following image is an example Home page plus descriptions of the main features:



The following list describes the ProcServe Home page as indicated by the numbering:

- **(1) Buyer Menu.** Shop and manage your shopping:
Supplier Directory. View your supplier's details.
- **(3) Admin Menu.** Administer your organisation and users:
 - **User Management.** Edit user accounts.
 - **Supplier Management.** Suppliers you trade with.
 - **Marketplace Admin.** Manage your Marketplace and classification views.
 - **Catalogue Management.** Manage your catalogues.
 - **Edit organisations.** View and edit your organisation.
- **(4) Title Bar Features.**
 - **Current User.** The name of the logged in user is displayed.
 - **My Profile.** View and edit your details.
 - **Feedback.** Submit feedback to the ProcServe Team.
 - **Logout.**
- **(5) Feed Area.** In the Home page this area holds news and other information of interest.

2.1.3 My Profile

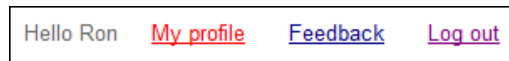
Overview

You can view or edit your user profile details or change your password using the My Profile page.

Locating My Profile

The following steps describe how to locate and use the My Profile page:

1. In the top menu bar click the My Profile link:



2. The My Profile page is displayed:



3. The My Profile page allows you to view and change your details:

Click the Edit my Profile button to display the User Profile page in edit mode:

 A form titled 'Edit My Profile' with a light gray background. It contains several input fields and checkboxes. The fields are: Title (dropdown menu with 'Mr' selected), First name* (text box with 'Monty'), Last name* (text box with 'Pylon'), Status (text 'Active'), Username (text 'ronsmail@agbuyer'), Email address* (text box with 'monty@tiscali.co.uk'), Confirm Email address* (text box with 'monty@tiscali.co.uk'), Organisation (text 'ADAM BUYER ORG'), Default address* (dropdown menu with 'LANTERN HOUSE, GU14TX, GUILDFORD' selected), Telephone number (text box with '01483 222222'), Fax number (text box with '01483 222244'), and Preferred language (dropdown menu with 'English (UK)' selected). Below these fields are three checkboxes: 'Message Of The day' (checked), 'News' (checked), and 'Welcome message' (checked). At the bottom of the form is a button labeled 'Save Changes'.

4. The following is displayed and can be edited:

FIELD NAME	FIELD CONTENT
Title, First Name, Last Name	Mandatory

Username	Cannot be changed
Email Address	Mandatory
Confirm Email Address	Mandatory
Organisation	Cannot be changed
Default Address	Mandatory
Telephone Number	Optional
Fax Number(Optional).	Optional
Preferred Language	
Data Feeds	Admin Users Only
Catalogue / Classification Views*	Admin Users Only

*Not used by organisations who access the system from their P2P system.

Warning! Email addresses are unique within ProcServe, they can only be used once.

5. Save Changes Button:

When you have finished making changes to your profile you click this button to validate, and if valid, save your changes.

Note: Changes to your profile may not be completed until after you log back into the system.

Password change. This area allows you to change your password:

Change your password

Please note that your password (for security reasons) must follow these rules:
Minimum of 6 character(s).

Enter your current password

Enter your new password

Please re-enter your new password

Save new password

6. Enter your existing and new password to change your password:

The entries are validated and, if valid, the system will display a message:

Success! You have changed your password. The next time you log in you will need to use this new password.

Memorable Word Change. This area allows you to change your memorable word:

Change your memorable word

This is a word that is personal to yourself, easy to remember and can be any word that you choose to use but you must ensure that: It is at least 8 characters long. It is kept safe and secure.

The memorable word hint is a reminder of your memorable word in case you forget it.

New memorable word	<input type="text"/>
New word again	<input type="text"/>
Memorable word hint	<input type="text" value="game with ball"/>

Save new memorable word

7. Enter your new memorable word and hint to change your memorable word:

The entries are validated and, if valid, the system will display a message.

2.1.4 Unlocking your Account

Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:

Subject: Your account has been locked.

Hello

Your account has been locked due to too many invalid login attempts. To unlock your account you will need both a username and access key (included below) and you will need your memorable word, which you specified in your account profile.

Your access key is: D8C4DJJD4

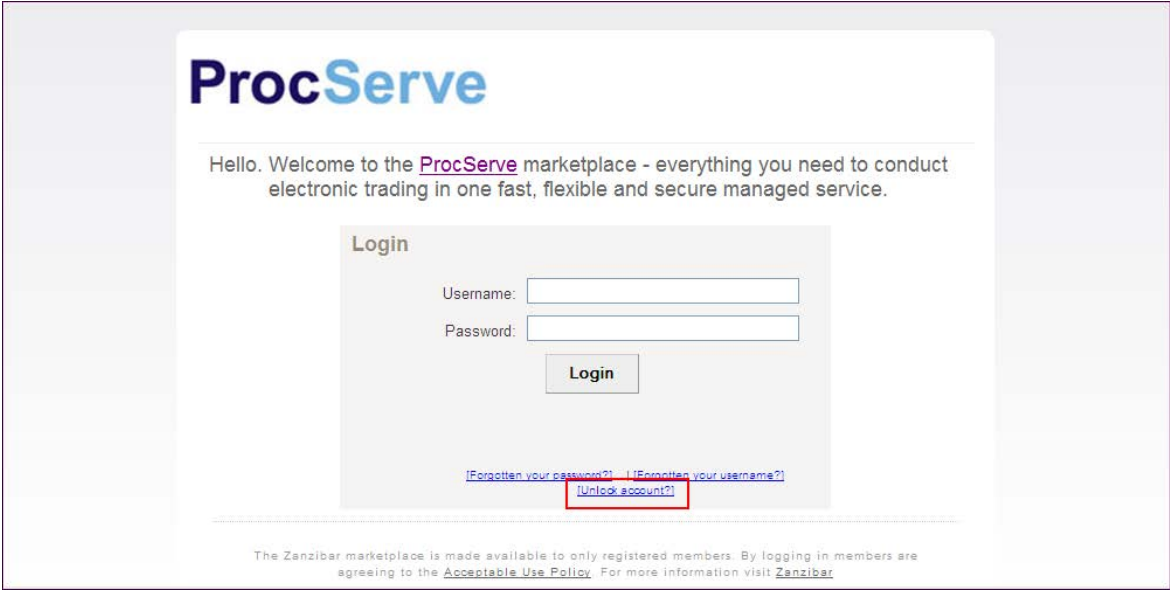
Instead of typing the access key out try copying and pasting it into the unlock screen, using the following steps:

- Highlight the access key making sure there are no spaces at the beginning or end
- Right click and select 'Copy'
- In the access key field of the login screen right click again and select 'Paste'

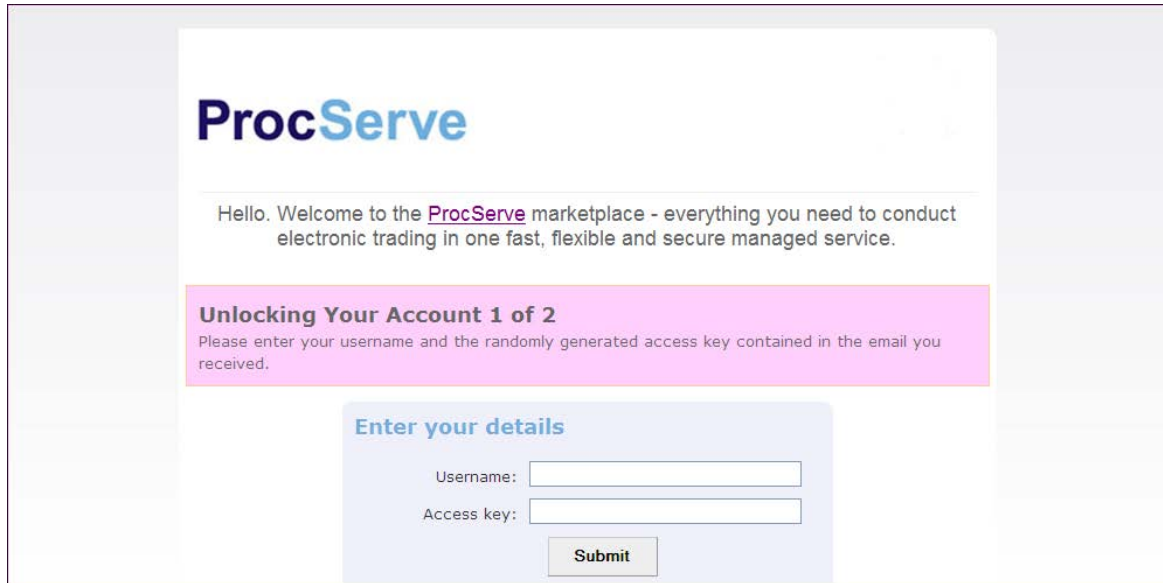
You can unlock your account at:

<https://preprod-buyers.procserveonline.com/procserveportal/auth.html>

2. Navigate to the url within the email or use the 'Unlock account?' on the login page:

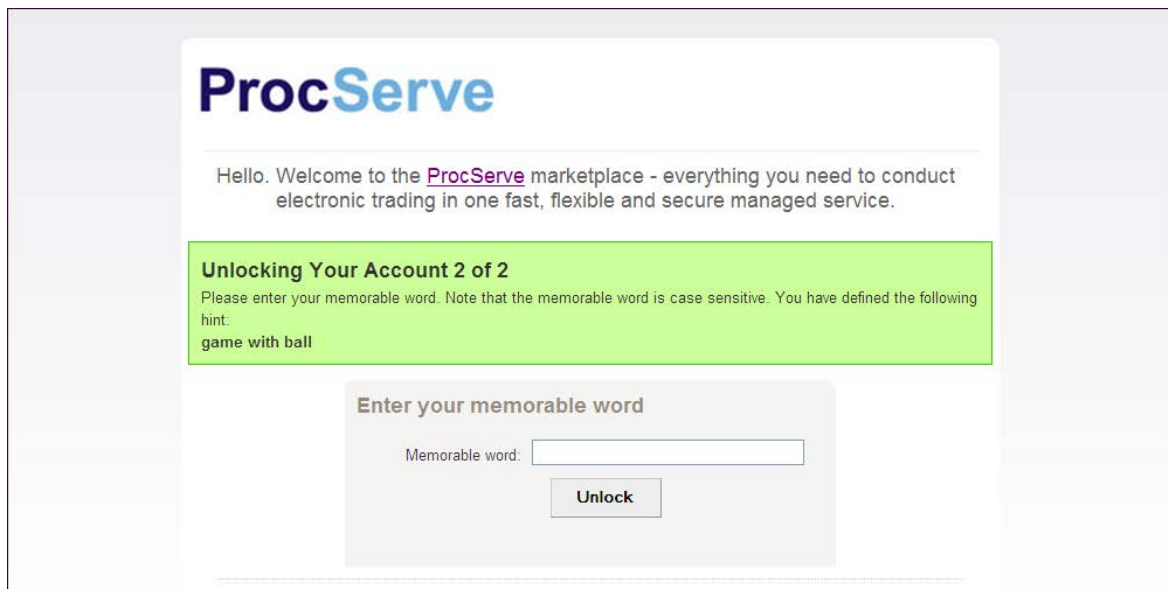


3. Enter your user name and access key that was issued in the email:



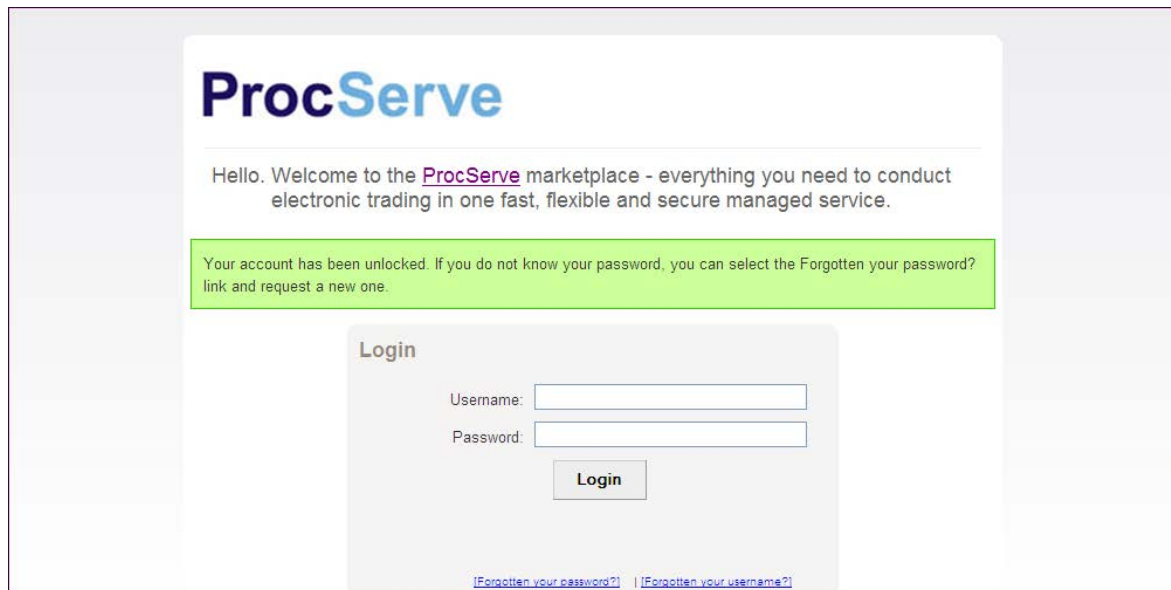
The image shows the ProcServe account unlocking interface. At the top is the ProcServe logo. Below it is a welcome message: "Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service." A pink banner reads "Unlocking Your Account 1 of 2" and instructs the user to enter their username and access key from an email. Below this is a light blue box titled "Enter your details" containing two input fields: "Username:" and "Access key:". A "Submit" button is at the bottom right of the box.

4. Enter your memorable word using the hint written in the instructions bar:



The image shows the second step of the ProcServe account unlocking process. It features the ProcServe logo and the same welcome message. A green banner reads "Unlocking Your Account 2 of 2" and asks the user to enter their memorable word, noting it is case sensitive and providing a hint: "game with ball". Below this is a light grey box titled "Enter your memorable word" with a single input field labeled "Memorable word:". An "Unlock" button is positioned at the bottom right of the box.

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you:



The image shows a web browser window displaying the ProcServe login page. The page has a light gray background with a white central content area. At the top, the ProcServe logo is displayed in blue. Below the logo, a welcome message is shown. A green box contains a message about the account being unlocked. Below this is a login form with fields for Username and Password, and a Login button. At the bottom of the form, there are links for forgotten password and username.

ProcServe

Hello. Welcome to the [ProcServe](#) marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.

Your account has been unlocked. If you do not know your password, you can select the [Forgotten your password?](#) link and request a new one.

Login

Username:

Password:

[Login](#)

[\[Forgotten your password?\]](#) | [\[Forgotten your username?\]](#)

2.1.5 Feedback


Overview

You provide feedback to us using the Feedback page.

Locating the Feedback Page

The following steps describe how to locate and use the Feedback page:

1. In the top menu bar click the Feedback link:

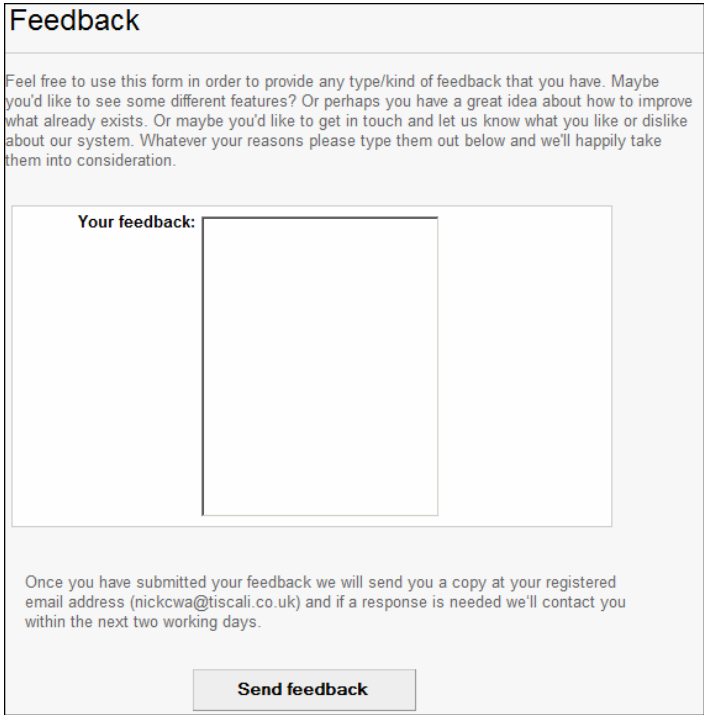


Hello Ron [My profile](#) [Feedback](#) [Log out](#)

The Feedback Page is displayed:

2. Enter your feedback in the text area:

3. Click the send feedback button:



Feedback

Feel free to use this form in order to provide any type/kind of feedback that you have. Maybe you'd like to see some different features? Or perhaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system. Whatever your reasons please type them out below and we'll happily take them into consideration.

Your feedback:

Once you have submitted your feedback we will send you a copy at your registered email address (nickcwa@tiscali.co.uk) and if a response is needed we'll contact you within the next two working days.

Send feedback

Note: Please do not report system errors using this form, please email or call the ProcServe service desk.

2.1.6 Getting Support

The ProcServe Commerce Network provides full support services via a dedicated service desk.

Contact details for the service desk are shown below and can also be found by clicking "Contact Helpdesk" at the bottom of each page on the buyer portal:

How to reach us	Comments
Email: zanzibarhelpdesk@procserve.com	Please provide full contact details, organisation name and a description of the support issue / query.
Telephone : 0845 6032885	For general queries, questions and support issues.

2.2 Buyer Menu

2.2.1 Start Shopping

2.2.1.1 Shopping Overview

Overview

This section provides an overview to the shopping features and the general use of the ProcServe Catalogue Search.

The following list describes what we have documented to help you shop and create requisitions:

Shopping home page. You start shopping from the Shopping home page.

- **Adding catalogue Items to your Requisition.** You can browse, search or navigate the ProcServe supplier catalogues and add items to your shopping cart as you go.
- **Shopping Cart.** Your shopping cart is where the items you select for purchasing are stored. You can check your shopping cart at any time. You can change or remove items and resume shopping. You can also view item and supplier details where appropriate.
- **PunchOut.** The shopping cart page allows you to access supplier catalogues that are not on the ProcServe buyer portal. You can then add items from these catalogues to your requisition.
- **Making Shopping Easier.** There are also some features we would like you to know about that will help you shop:
 - **Checking Item Details.** For items in the Marketplace you can view item and supplier summary details as well as check a list of items other people bought.
 - **Favourites.** You can add items that appear on your home page. You can add these items directly to your shopping cart.
 - **Shopping Lists.** When you have items in your shopping cart you can save the items for later use.
 - **Comparing Catalogue Items.** You can compare items to see which meets your needs.
- **Submitting your Requisition.** You can checkout your shopping cart at any time during shopping. You can update quantities or remove items before sending the requisition for authorisation or returning to your shopping.

2.2.1.2 Shopping in the Catalogue Search

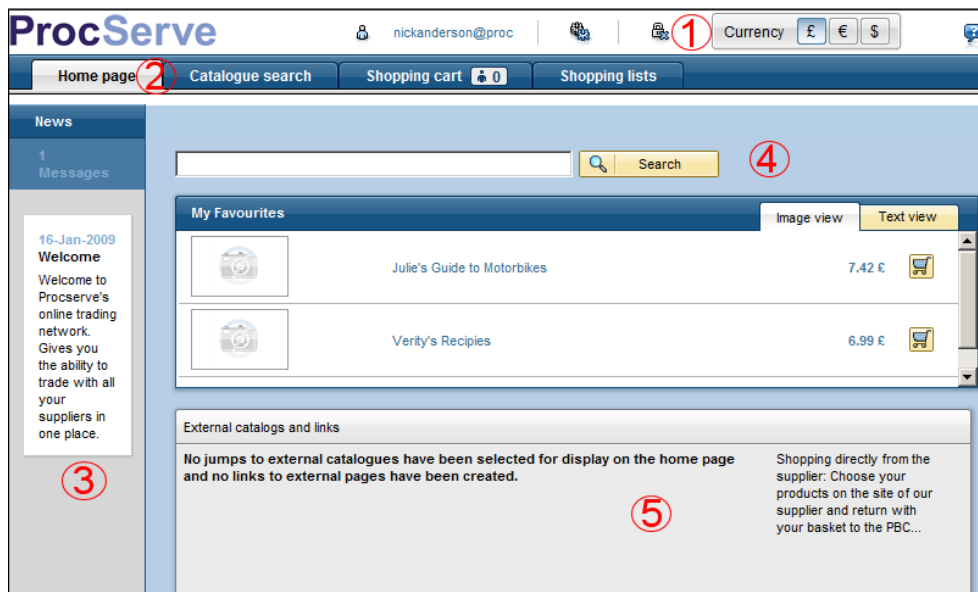
Overview

This shows how to access the catalogue system and introduces the catalogue home page features.

1. Punchout from your P2P in to the Marketplace:

2. The catalogue home page:

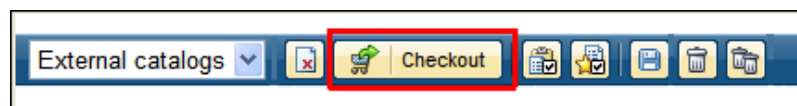
The catalogue home page will open in a new window:



3. From here you can search for items you wish to add to your shopping cart. For more information on this please see the Catalogue Shopping section

4. When you have completed all your shopping you can navigate to the shopping cart to checkout.

5. Checkout: When you have checked that the items you wish to order are OK you are ready to click the checkout button.



Note: The order will not be sent to the supplier until your requisition has been approved.

Note: Shopping Basket Caching - Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.

6. If your Checkout is successful:

You will be redirected to your P2P or back office system.

2.2.2 Supplier Directory

2.2.2.1 Supplier Directory Overview

Overview

This section shows how you can use Supplier Directory.

The Supplier Directory allows you to see what suppliers you have traded with and what suppliers are available to your Marketplace.

Note: A supplier is shared amongst many buying organisations. A supplier listed under the Supplier Directory may not mean they have provided your buying organisations with a catalogue to buy from.

Supplier Directory

Suppliers my organisation has traded with

Search all available suppliers

Browse available suppliers

Supplier name	DUNS	Category	Telephone Number
OGCBS Supplier	919191919	N/A	

Basic and Enhanced suppliers

All suppliers are assigned a category based on the highest level of enablement they support. This category is an indication of their ability and does not mean they support this level of enablement for every buying organisation:

There are 4 categories of suppliers: Basic, Bronze, Silver and Gold. These are explained below:

BASIC

Basic suppliers have been invited to join the marketplace but have not yet registered. They can be viewed in the Supplier Directory and can be used for Free Text Orders. They are not able to return eInvoices..

BRONZE

Bronze suppliers are registered on the marketplace and are able to return eInvoices and other eDocuments for all buying organisations.

SILVER

Silver suppliers are registered on the marketplace and provide electronic content (catalogues, etc) to at least one buying organisation.

GOLD

Gold suppliers are registered on the marketplace and have integrated their systems into the marketplace, meaning that they can process your orders more efficiently.

Note: The category (Basic, Bronze, Silver and Gold) is current status of the supplier. For example if a supplier has a catalogue they will be shown as a silver supplier. If they remove their catalogue there status will reflect this by showing the supplier as bronze.

2.2.2.2 The Supplier Directory

Overview

You can view Suppliers you trade with or you can search or browse for available Suppliers using the Supplier Directory feature.

Locating the Supplier Details Page

The following steps describes how you locate and use the Supplier Details page:

1. **Navigate Buyer Menu >> Supplier Directory.**
2. **The Supplier Directory page is displayed.**
3. **The Supplier Directory page contains three tabs.**
These are described in the following steps.

4. **Suppliers my organisation has traded with tab.**

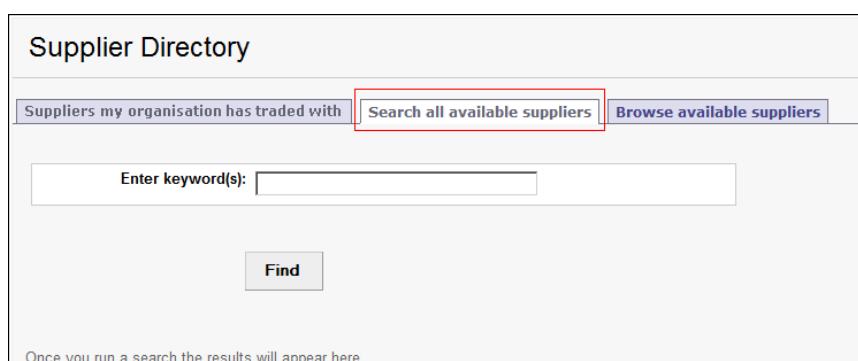
This tab allows you to view suppliers who your organisation has traded with:

Supplier Directory			
Suppliers my organisation has traded with			
		Search all available suppliers	Browse available suppliers
Don't see your supplier here? Request a new supplier >			
First/Prev] 1, 2 [Next/Last]			
Supplier name	DUNS	Category	Telephone Number
Oxford Computer Consultants Ltd	235221780	N/A	-
3M Healthcare	212340298	N/A	-
A and C Black	210028353	N/A	-
AJS Test3	101010105	N/A	0123
DCSF Test Supplier	339911771	N/A	02073336176
DePuy International Limited	896498813	N/A	-
DHL Global Mail Ltd	965317441	N/A	-
ESPI Supplier Account	800000008	N/A	01706747328
Gailarde Ltd	211612478	N/A	-
Keane Ltd	227657251	N/A	-

The following list describes how you use the above tab:

4.2 Supplier List. You can view the details listed or click a Supplier Name to load the Supplier Profile page.

5. Search all available suppliers tab. This tab allows you to search for a Supplier within the Marketplace using key words:



Supplier Directory

Suppliers my organisation has traded with **Search all available suppliers** Browse available suppliers

Enter keyword(s):

Find


Once you run a search the results will appear here.

The following list describes how you use the above tab:

5.1 Enter Keywords. Enter the key words you wish to search on.

5.2 Find Button. Click the Find button.

5.3 Results. If one or more Suppliers matched your key words then a list of Supplier is displayed:



Enter keyword(s): **proc**

Find

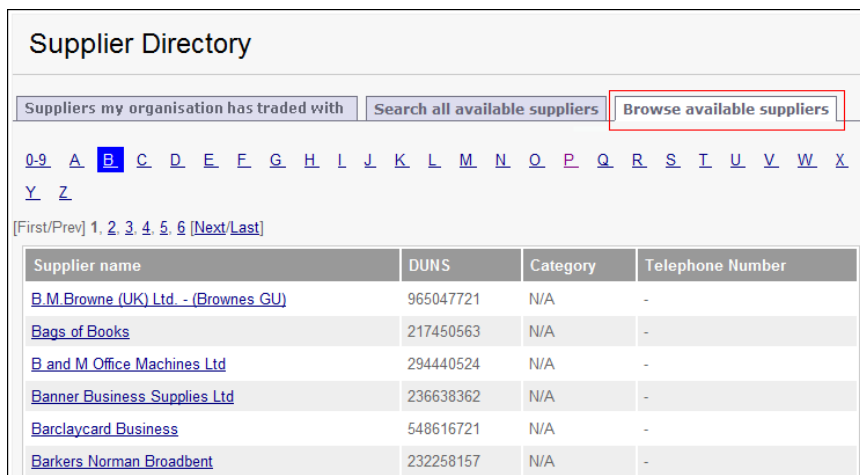
Search results for "proc" (5 of 5)

Supplier name	DUNS	Category	Telephone Number
ProcServe	349363296	N/A	020 7730 9000
ProcServeOnline	10000000	N/A	
Procserve Supplier Support Ltd	978320999	N/A	0207 333 53875

You can view the details listed or click a Supplier Name to load the Supplier Profile page.

6. Browse available suppliers tab.

This tab allows you to browse Suppliers within the Marketplace alphabetically or numerically. For example:



The screenshot shows the 'Supplier Directory' page. At the top, there are three tabs: 'Suppliers my organisation has traded with', 'Search all available suppliers', and 'Browse available suppliers' (which is highlighted with a red box). Below the tabs, there is a navigation bar with links for '0-9', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', and 'Z'. The 'B' link is highlighted. Below the navigation bar, there is a pagination link '[First/Prev] 1, 2, 3, 4, 5, 6 [Next/Last]'. The main content area displays a table of suppliers.

Supplier name	DUNS	Category	Telephone Number
B M Browne (UK) Ltd - (Brownes GU)	965047721	N/A	-
Bags of Books	217450563	N/A	-
B and M Office Machines Ltd	294440524	N/A	-
Banner Business Supplies Ltd	236638362	N/A	-
Barclaycard Business	548616721	N/A	-
Barkers Norman Broadbent	232258157	N/A	-

6.1 Select Letter or Number. Click the letter or number (0-9) . In the above image "B" has been clicked.

6.2 Results. As shown in the above image if one or more Suppliers matched your letter or number then a list of Supplier is displayed.

You can view the details listed or click a Supplier Name to load the Supplier Profile page.

2.2.2.3 The Supplier Profile Page

Overview

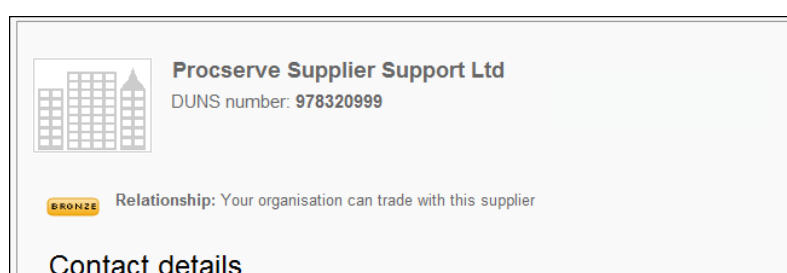
The supplier profile page displays supplier information as the result of a search from the supplier directory.

You can use the supplier profile page to view supplier details or to hide a supplier so it cannot be used in your organisation.

Locating the Supplier Profile Page

The following steps describes how you access and use the supplier profile page:

1. The Supplier Profile page is displayed when you select a supplier in a list in the Supplier Directory.



2. The Supplier Profile Page Details.

The Supplier Profile consists of the following areas:


Supplier Basic Details (shown above):

This area displays:

DUNS Number	A DUNS Number is a nine-digit code assigned by Dun & Bradstreet to identify unique business's separate and distinct operations.
Supplier Relationship	The two types of supplier are Basic and Enhanced. Suppliers can be Bronze (accepts electronic orders and can produce electronic invoices and credit notes etc), Silver (provides one or more catalogues) or Gold (fully integrated). Basic suppliers can only accept orders as email attachments and cannot use the ProcServe electronic forms.

Contact Details:

This area displays Supplier Contact details:

Registered name	Procserve Supplier Support Ltd
Email	dman@mail.com
Telephone number	0875 875 53875
Address	67, Great St London, EC36CC GB
 Download as a vCard What is this?	

Tip: You can contact the suppliers using the details stored:

- You can click the email field to send an email to us if you have a local mail program installed, for example Outlook.
- Click the Download as vCard link to download the Supplier details as a vCard. When you click the link a prompt will appear. You can save the vCard to your computer and import it onto your mail program later.

Financial and other Information:

This area holds finance and other details:

Financial information	
Tax code	235634
Tax Number	7777
Payments accepted	Cheque, Cash
Currencies accepted	Pound Sterling
Other information	
Short name	PSSSup

2.3 Admin Menu

2.3.1 Administration Overview

Overview

This section describes how you can configure and manage your users, suppliers, news items, marketplace, catalogues and organisation details.

The following list provides links to the administrative tasks you can perform:

User Management	View and manage user accounts
Supplier Management	View and manage how you trade with suppliers
News Management*	You can add or edit news items to the home page
Marketplace Admin	View user access and classification views to your Marketplace
Catalogue Management	Manage supplier catalogues
Edit Organisation	View and edit your organisation details

* Only available to ProcServe Support

2.3.2 User Management

2.3.2.1 User Management Overview

Overview

This describes user types and what they can do and provides links to related topics.

Basic User Details

The following list describes where to find user task instructions:

Disabling Users	To disable a user you should contact the ProcServe service desk.
Adding a User	Additional users can be added by super users.
Unlocking User Account	If your account is locked you will need to contact the ProcServe service desk.

The following describes each buyer type (some of these might not be applicable to your organisation):

Buyer Super User	Buyer who can perform all services that the organisation has been configured for plus administrative tasks for their own organisation. For example they will be able to change some or their own organisation or users details, load and approve catalogues.
Buyer Basic User	Buyer who can perform a sub set of the services that the organisation has been configured for.
System	Required to enable authentication to transmit and download transactions.

2.3.2.2 Adding a User

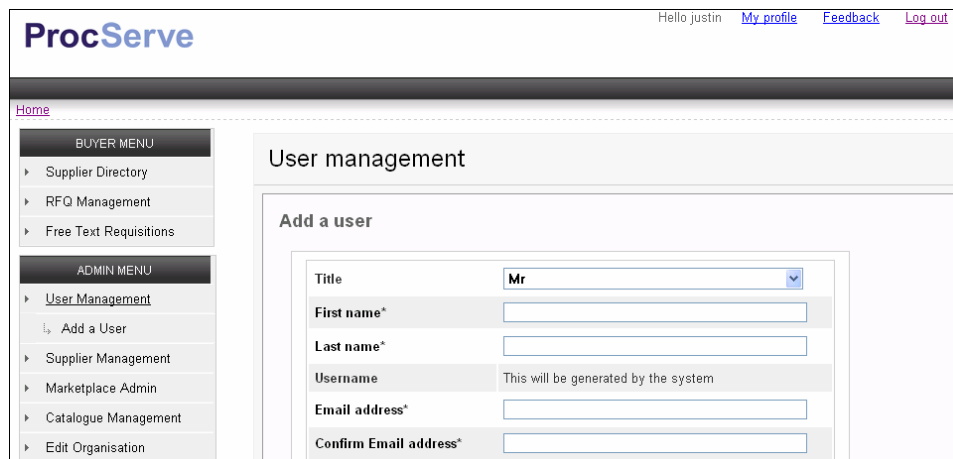
Overview

You can add a new user to your organisation if you have the role of buyer super user.

Adding a New User

The following steps will show you how to navigate to the User Management page and add new users.

1. Navigate >> User Management >> Add a User:



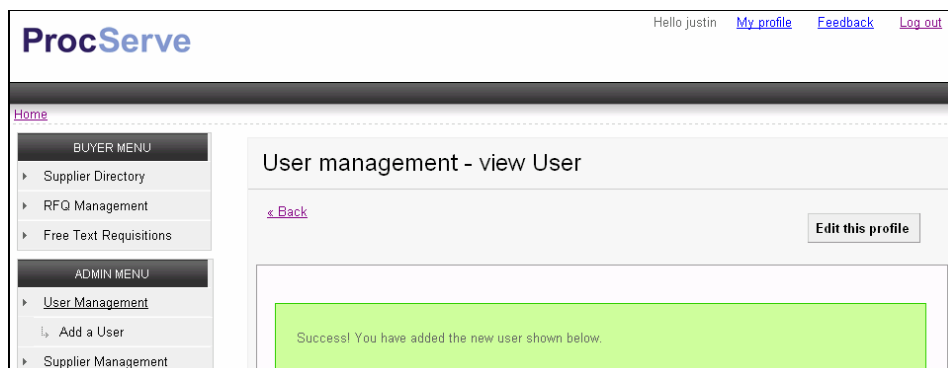
The screenshot shows the ProcServe web application interface. At the top right, it says 'Hello justin' with links for 'My profile', 'Feedback', and 'Log out'. On the left is a navigation menu with 'BUYER MENU' (Supplier Directory, RFQ Management, Free Text Requisitions) and 'ADMIN MENU' (User Management, Add a User, Supplier Management, Marketplace Admin, Catalogue Management, Edit Organisation). The main content area is titled 'User management' and contains the 'Add a user' form. The form fields are: Title (dropdown menu with 'Mr' selected), First name* (text input), Last name* (text input), Username (text input with the note 'This will be generated by the system'), Email address* (text input), and Confirm Email address* (text input).

2. Enter the details of the user:

Note: Email address must be unique for each user.

3. When complete click 'Save' at the bottom of the screen:

You will be shown the success notification as shown below:



The screenshot shows the ProcServe web application interface after a user has been added. The top navigation and left menu are the same. The main content area is titled 'User management - view User'. It includes a '< Back' link and an 'Edit this profile' button. A large green box contains the message: 'Success! You have added the new user shown below.'

4. The new user has been created:

Log in details will be sent to the email account specified for that user.

2.3.2.3 Viewing or Changing Basic User Details

Overview

You can use the User Management feature to view or change basic details for the users in your organisation.

You can change address and contact details, change the user type (e.g. buyer basic or buyer super user) or update the user's classification views.

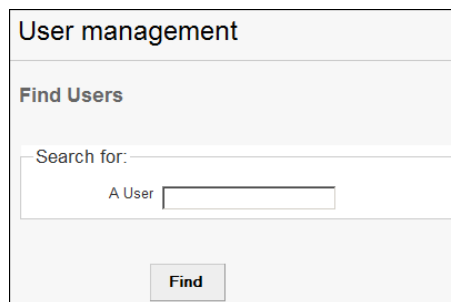
Note: For any other changes you need to contact the ProcServe service desk.

Locating a User Account

The following steps describe how you access and use the user management feature:

1. Navigate Admin Menu >> User Management menu option.

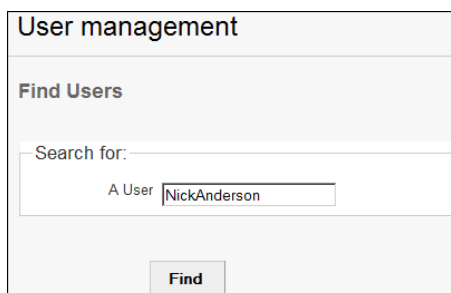
2. The Find Users page is displayed:



The screenshot shows a web interface titled "User management". Below the title is a section labeled "Find Users". Inside this section, there is a search bar with the text "Search for:" followed by a text input field containing the placeholder "A User". Below the input field is a button labeled "Find".

3. You use the search functionality to search for the user you require by name or user ID.

4. Enter a search string. For example:



This screenshot is identical to the previous one, but the text "NickAnderson" has been entered into the search input field.

Note: The search is not case sensitive.

5. Click the Find button.

6. If the system finds one or more matching users they are listed:

Search results for "NickAnderson" (6 of 6)		
User name	Added	Updated
nickanderson@agbuyer	16 December 2008	22 February 2009

Tip: You can also select a user from the list of recently added/changed users:

Last 5 added / edited users		
User name	Added	Updated
nickanderson@agbuyer	16 December 2008	22 February 2009
ronsmail@agbuyer	05 January 2009	03 February 2009
adamgeorge@agbuyer	24 April 2008	20 January 2009

Click the user name for the relevant user to display the user details. See [User Details](#) below.

7. Click the user name link for the user you wish to edit.

8. The User Profile page is displayed:

[« Back](#)[Edit this profile](#)

Mr Nick Anderson

Status	Active
Username	nickanderson@agbuyer
Email address	nick@ridge.co.uk
Organisation	ADAM BUYER ORG
Address	LANTERN HOUSE GUILDFORD GU14TX UNITED KINGDOM
Telephone number	
Fax number	
Preferred language	English (UK)
Role	Buyer Super User
Data Feed(s)	Welcome message News Message Of The day
Catalogue view(s)	

Editing a User Account. Click the Edit this profile button.

10. The Edit User page is displayed:

[Back without saving changes](#)

Edit User – Nick Anderson

Title	Mr
First name*	Nick
Last name*	Anderson
Status	Active
Username	nickanderson@agbuyer
Email address*	nick@ridgepc.fsnet.co.uk
Confirm Email address*	nick@ridgepc.fsnet.co.uk
Organisation	ADAM BUYER ORG
Default address*	LANTERN HOUSE, GU14TX, GUILDFORD, UNITED KINGDOM
Telephone number	
Fax number	
Preferred language	English (UK)
Role*	<input type="checkbox"/> Buyer Basic <input checked="" type="checkbox"/> Buyer Super User
Data Feed(s)	<input checked="" type="checkbox"/> Welcome message <input checked="" type="checkbox"/> News <input checked="" type="checkbox"/> Message Of The day
Catalogue view(s)	View 1

[Add another view](#)

[Save Changes](#)

11. The following is displayed and can be edited:

Title, First Name, Last Name	Mandatory
Username	Cannot be changed
Email Address	Mandatory
Confirm Email Address	Mandatory
Organisation	Cannot be changed
Default Address	Mandatory
Telephone Number	Optional
Fax Number(Optional).	Optional
Preferred Language	Mandatory
Data Feeds*	Admin Users Only
Catalogue / Classification Views*	Admin Users Only

* Not used by organisations who access the system from their P2P system.

Warning! Email addresses are unique, they can only be used once.

Note: Changes to a user profile may not be completed until after the user logs back into the system.

2.3.3 Edit Organisation

2.3.3.1 Organisation Overview

This describes how organisations are managed within ProcServe.

Basic Details	This is the information that defines your organisation.
System Settings	These are the settings that define what you see, the look and feel of the web pages and how you want your password behaviour defined.
Document Settings	You cannot change these details yourself. These details are normally configured when we create your organisation. If you think that settings for your shopping cart, quote or other documents need changing please contact support.
Service Settings	You cannot change these details yourself. These define the buyer, supplier and admin features you are able to access. The default menu for each user type is defined by what we have configured for you at organisation level and then by user type. If you feel you do not have all the required features you should contact the Service Desk.

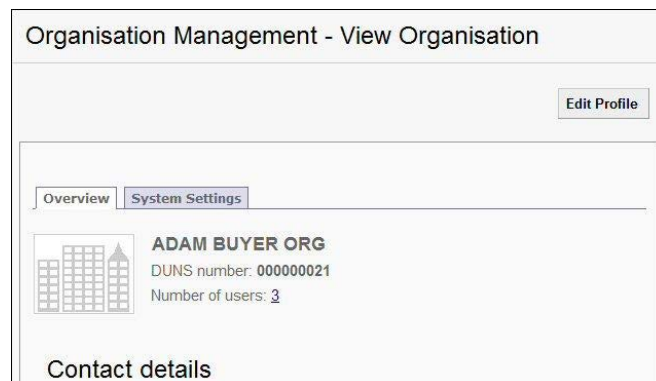
2.3.3.2 Edit Organisation Details

Overview

As a super user you can make some changes to your organisations details.

Locating the Organisation Profile Page

1. Navigate Admin Menu >> Edit Organisation.
2. The Organisation Profile page is displayed:



3.Editing Organisation Details.

Select the Overview tab and click the Edit Profile button.

The following list describes the Edit Overview page:

Organisation Name	View / edit name of your organisation (mandatory)
Upload a logo	Upload a company logo (optional)
Registered Name	Name the company is registered in for your organisation (mandatory)
Website	View / edit website URL for your organisation (optional)
Email	View / edit default contact Email for your organisation (optional)
Telephone number	View / edit default contact Telephone for your organisation (optional)
Fax Number	View / edit default contact Fax for your organisation (optional)
Address	View / edit default address for your organisation (mandatory)
City / Town	View / edit default city / town for your organisation (mandatory)
County	View / edit default county for your organisation (optional)
Country	View / edit default country for your organisation (mandatory)
Post Code	View / edit default post code for your organisation (mandatory)

Contact details

Registered name

ADAM BUYER ORG

Website

Make sure to include the http://www bit

Email

JIM.JONES@procserve.org

Generic contact address for the organisation

Telephone number

01438466908

Fax number

Address

LANTERN HOUSE

City / town

GUILDFORD

County

Country

UNITED KINGDOM

Post Code

GU14TX

Other information

Short name

AGBUYER

Description

Note: Other details may be displayed here depending on what we have set up. To change any of these details please contact the Service Desk.

3. Editing System Settings Details.

Select the System Settings tab and click the Edit System Settings button.

4. The Edit System Settings page is displayed in Edit mode:

DUNS Number	View your organisations DUNS number. You cannot change your DUNS number.
Default Language	You can select a different default language from the drop down list.
Homepage Feeds	These are the default options for the users in your organisations.
User Roles	These are the roles available for your users.

Edit System Settings

ADAM BUYER ORG

DUNS number

000000021

System set up

Default language

English (UK)

Homepage feeds

☒ Welcome message

☒ Message Of The day

☒ News

User roles

☒ Buyer Super User

☒ Buyer Basic

☒ System

Save Changes

2.3.4 Supplier Management

2.3.4.1 Supplier Management Overview

Overview

This section describes how you invite suppliers and enable them to register.




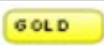
Once a supplier is available it appears in the Supplier Directory.

You can view and change some of the details of suppliers who are already on the system who you invited. You can also send an invite to suppliers you wish to trade with.

Suppliers are invited by buyers to join the ProcServe Trading Network by sending an email request within the Supplier Management feature.

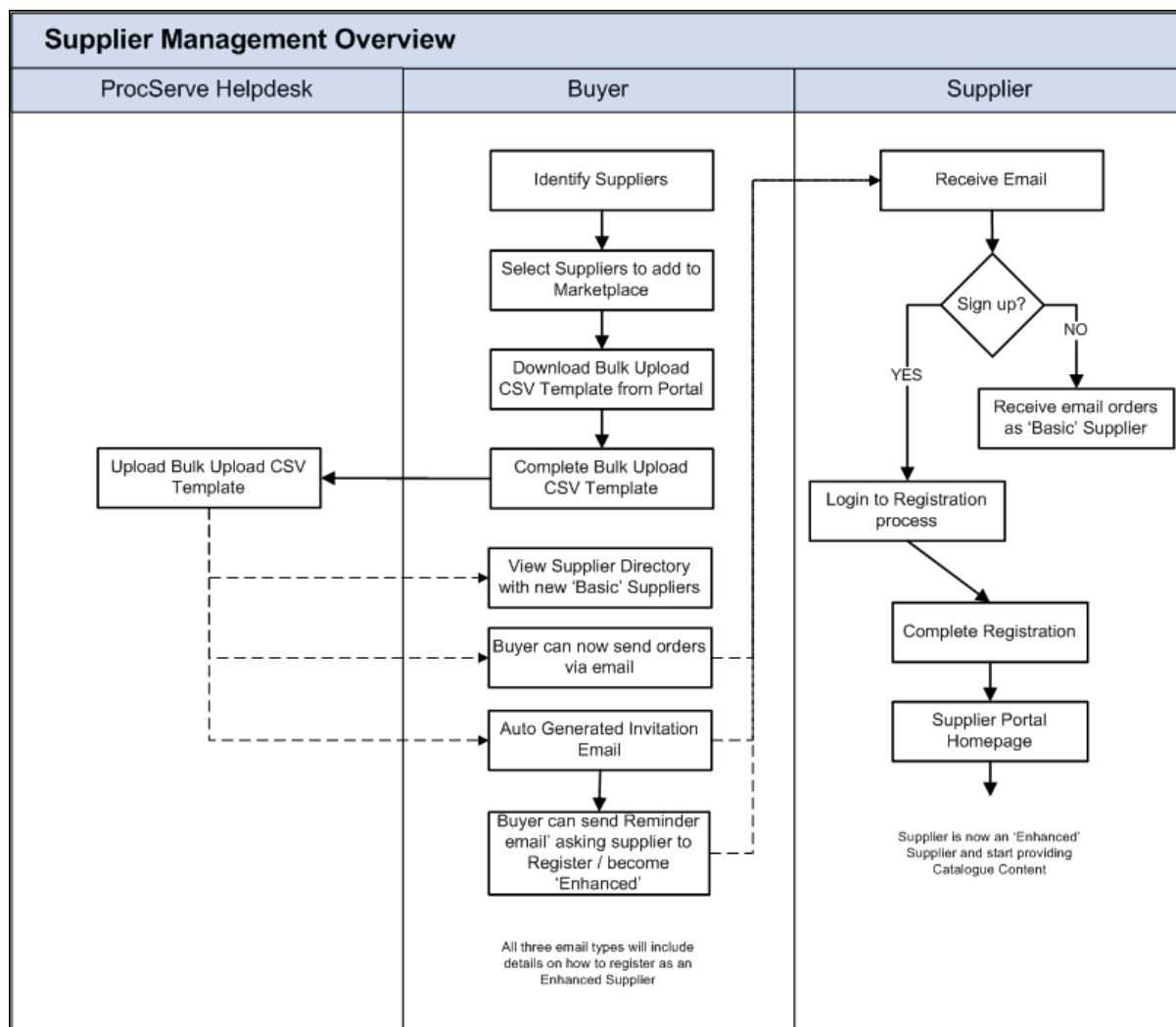
Supplier Classifications

Suppliers are classified as Basic or Enhanced (Bronze, Silver or Gold). These classifications represent the level of integration the supplier has with the Trading Network and not their size, spend or relationship with the Buying organisations.

	Basic suppliers have been invited to join the Trading Network but have not yet registered. They can be viewed in the Supplier Directory and can be used for free text orders. As these suppliers are not registered they do not have access to the system and are therefore not able to provide content or return invoices.
	Bronze suppliers are registered on the Trading Network and are able to return invoices and other eDocuments for all buying organisations.
	Silver suppliers are registered on the Trading Network and provide electronic content (a catalogue or PunchOut connection) to at least one buying organisation.
	Gold suppliers are registered on the Trading Network and have integrated their systems into the Trading Network

Supplier Enablement Process

The diagram below outlines the process for inviting and registering suppliers:



2.3.4.2 The Supplier Management Page

Overview

This describes the Supplier Management page.

The Supplier Management page covers three areas:

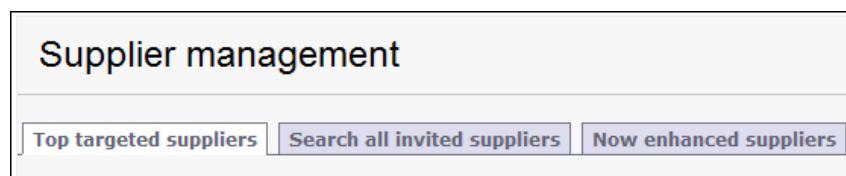
Top Targeted Suppliers	Suppliers you have selected to focus on as part of your supplier adoption programme.
Search All Invited Suppliers	Using the Search All Invited Suppliers tab you can add Suppliers to your Top Targeted Suppliers tab so they can be accessed immediately.
Now Enhanced Suppliers	This tab contains a list of all suppliers now registered including their 'Enhanced Supplier' status and the date they completed their registration.

Note: Once the Supplier details have been bulk uploaded to the console they will be viewable within the 'Search All Invited Suppliers' tab.

Locating the Supplier Management Page

The following steps describe how you locate and use the Supplier Management page:

1. **Navigate Admin Menu >> Supplier Management:**
2. **The Supplier Management page is displayed:**



The Supplier Management page tabs are described in the steps below:

- **Top Targeted Suppliers**
- **Search All Invited Suppliers**
- **Now Enhanced supplier**




3. Top Targeted Suppliers Tab:

Suppliers you have selected to focus on as part of your supplier adoption programme. You can also email one or more of your suppliers:

Supplier management

Top targeted suppliers
Search all invited suppliers
Now enhanced suppliers

Top targeted suppliers (3 of 3)

	Supplier name	DUNS number	Contact details	Originally invited by	Total inviting	Date invited
<input type="checkbox"/>	 Cleveland Clinic Supplier	726208728	Rob@procserve rob@proc Edit	ProcServe	1	06 January 2009
<input type="checkbox"/>	 New Paper Supplies Ltd	123456789	Jim Bouy Jim@NewPaper.co.uk Edit	ProcServe	1	16 February 2009
<input type="checkbox"/>	 Pencil House PLC	234567890	John Smithers Johns@Pencil.com Edit	ProcServe	1	16 February 2009

Toggle all

Email selected

4. Search all Invited Suppliers Tab:

The search all invited suppliers tab allows you to search for an invited supplier, add a supplier to your targeted list, send an email to previously invited suppliers and work with supplier details. You can search all invited suppliers who have not registered yet:

Supplier management

Top targeted suppliers
Search all invited suppliers
Now enhanced suppliers





Search all invited suppliers

Search for:

A supplier

Find

Last 5 added suppliers

	Supplier name	DUNS number	Contact details	Originally invited by	Total inviting	Date invited
<input type="checkbox"/>	 Cleveland Clinic Supplier	726208728	Rob@procserve rob@proc Edit	ProcServe	1	06 January 2009
<input type="checkbox"/>	 New Paper Supplies Ltd	123456789	Jim Bouy Jim@NewPaper.co.uk Edit	ProcServe	1	16 February 2009
<input type="checkbox"/>	 New Supplier	207536322	Richard richard@tuorte.com Edit	ProcServe	1	06 January 2009
<input type="checkbox"/>	 Pencil House PLC	234567890	John Smithers Johns@Pencil.com	ProcServe	1	16 February

4.1. Search:

You can enter a search string in the box and click the Find button to view a list of suppliers meeting the search criteria you enter. For example:

Search for:


A supplier

Find

4.2. Click the 'Find' button to list any results:

Search results for "p" (2 of 2)						
	Supplier name	DUNS number	Contact details	Originally invited by	Total inviting	Date invited
<input type="checkbox"/>	 New Paper Supplies Ltd	123456789	Jim Bouy Jim@NewPaper.co.uk Edit	ProcServe	1	16 February 2009
<input type="checkbox"/>	 Pencil House PLC	234567890	John Smithers Johns@Pencil.com Edit	ProcServe	1	16 February 2009
Toggle all						
Email selected						
Suppliers who are marked with the  will show up on your Top targeted suppliers list .						

The following can be actioned :

Select Supplier	<input checked="" type="checkbox"/> Check the box if you wish to send this supplier a email reminding them to follow up the invitation to trade.
Top Targeted Supplier	 This icon indicates that the supplier will appear on this page.To remove the supplier from this page click the icon. You can add suppliers into this list using the search all invited suppliers tab.
Supplier Name Link	Click the name of a supplier to view supplier details. You can view the supplier's details, change the email details and download the supplier details.
Edit button	Click this button to edit the relevant contact details.
Toggle All button	Click this to check all unchecked suppliers and uncheck all checked suppliers.
Email Selected button	When you have selected (checked) one or more suppliers you click this button to email the selected suppliers.

5. Send reminder email to Selected Suppliers to register:

When you click the email selected button on either the Top Targeted or Search Suppliers tabs the following page is displayed:

[Back](#)

Send a reminder email to invited suppliers

To:	rob@proc; Jim@NewPaper.co.uk; richard@tuorte.com; Johns@Pencil.com
Subject:	A reminder from ProcServe Trading Network

We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.

The ProcServe Trading Network is the preferred method of sending orders to suppliers for several Government Departments and public sector bodies. A full list of these organisations can be found on our website, listed below.

We would like you to join the ProcServe Trading Network so you can provide content for these organisations and return eInvoices to them. At the moment they can only send free text orders to {SupplierName}.

Transacting online has advantages for both buyers and suppliers. Removing paper from our transaction processes will save both organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.

5.1. You can change the subject or the main body of the email:

For example: you may wish to add further contacts details.

5.2. When you are satisfied with the email you click the Send button to send it:

This email will be sent from portal@procserve.com any replies will be directed to your email address (n.procserve@yahoo.co.uk). The suppliers will be blind copied in to this message, and will therefore not be able to see how else you have sent this to.

The following text will also be added to the email before being sent:

You can register your company as a supplier to ProcServe's Trading Network free of charge; there are no joining, hosting, or transaction fees for suppliers on our Trading Network. Joining ProcServe's Trading Network will give you an Enhanced account. With your Enhanced account you can provide content, manage your orders, and return eInvoices.

You can register by clicking on this weblink which will take you to our registration site where you can self-register.








To find out more about ProcServe's Trading Network please visit our website at <http://www.procserve.com/services/supplierEnablement/> or contact us at info@procserve.com

Thank you,

The ProcServe Supplier Team

6. Now Enhanced Suppliers Tab:

This tab contains a list of all suppliers now registered including their 'Enhanced Supplier' status and the date they completed their registration.


Supplier management					
Top targeted suppliers Search all invited suppliers Now enhanced suppliers					
Suppliers who have registered (1 - 10 of 23)					
First / Back 1, 2, 3 Next / Last					
	Supplier name	DUNS number	Contact details	Originally invited by	Registered date
	ProcServe	343063296	dahr.selmby@procserve.com		11 June 2008
	Nicks One Stop Shop	123456789	nick@onestopshop		22 February 2009
	Techo Creat Suppliers LTD	883059899			14 January 2009
	Temp Health Services	993283290			20 January 2009
	Cominserv LTD	883045345			14 January 2009
	ASSC	903000004	john.elson@procserve.com		18 June 2008
	COOPER LTD	555555555			15 June 2008

7. The Supplier Details Page.


When you click on a supplier name the organisation details page is displayed:

Supplier Directory - Supplier OrgProfile

[Back](#)




Pencil House PLC
DUNS number: 234567890

 Relationship: NA

Contact details

Registered name	Pencil House PLC
Address	Graphite House, Borough Road Mundanton, BN39UK GB

 [Download as a vCard](#)
[What is this?](#)

Email order settings

As this supplier is a Basic supplier, you can still order from them via email by supplying an email address below. Adding an email address will also add this supplier to your organisations Supplier invite list under Supplier management

"Email order" email address	Add an email order address for this supplier
-----------------------------	--

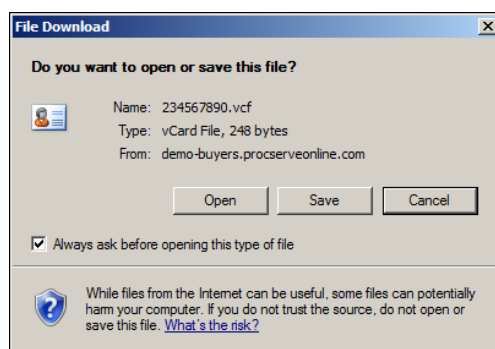
8. You can view the Supplier's details or perform the following tasks:

8.1. Download as a vCard Link:

vCards can be imported into your contact lists, for example Microsoft Outlook. When you click the link a dialogue is displayed, for example:

Click the Open button to perform the import immediately.

Note: The above example is from Internet Explorer v.7. Your browser may display a different dialogue box.



8.2 Add an email Order address for this supplier:

Click this link to add an email address.

Enter the email address in the top field.

Confirm the email address in the bottom field.

Click the Save email address button to validate, and if valid, save the changes.

Email order settings

As this supplier is a Basic supplier, you can still order from them via email by supplying an email address below. Adding an email address will also add this supplier to your organisations Supplier invite list under Supplier management

"Email order" email address*

"Email order" confirm email address*

Save email address

2.3.4.3 Adding a Supplier

Overview

This describes how you add supplier details to the system.

Locating the Add Supplier Page

The following steps describe how you locate and use the Add Supplier page:

1. Navigate Admin Menu >> Supplier Management >> Add a Supplier:

2. Adding Supplier Details.

The Add Supplier page is displayed:

The following list describes how you use the Add Supplier page:

Supplier Name	Mandatory
DUNS Number	Mandatory
Address	Mandatory
City / Town	Mandatory
County	Optional
Country	Mandatory
Post Code	Mandatory
Contact Name	Mandatory
Contact Email	Mandatory
Order Email	Mandatory

3. Add this Supplier to my Top Targets:

Check the box to add the Supplier as one of your top target Suppliers:


4. Click Add:





When you have completed all the required fields you click the Add button to validate the Supplier details and, if valid, save them:

The following example shows a completed Add Supplier page:

Supplier Name*	Total Paper Supplies
DUNS number*	12345677
Address*	GSM House, Glean Lane
City / Town*	Tonbridge
County	KENT
Country	UNITED KINGDOM
Post Code*	TN9 1GH
Contact Name*	Jimmy Gross
Contact Email*	JimGross@TPS.com
Order email	OrdersQ@TPS.com
<input type="checkbox"/> Add this supplier to my Top targets	

When you click the Add button the system shows your supplier added to the Last 5 Supplier list in the Search All Invited Suppliers tab:

Tip: Clicking the blue flag  will add the supplier to the Top Targeted Suppliers list. From here you can ensure that you focus your supplier adoption strategy on the suppliers that are more important to your organisation.

Last 5 added suppliers						
	Supplier name	DUNS number	Contact details	Originally invited by	Total inviting	Date invited
<input type="checkbox"/>	 Basic 101	666000101	Basic 101 Basic@procs.co.uk Edit	ProcServe	1	15 December 2008
<input type="checkbox"/>	 General Schools Supplies Ltd	084983028	Demo Supplier 1 pssupplier1@hotmail.co.uk Edit	Demo Buyer	1	11 December 2008
<input type="checkbox"/>	 RPC	112255448	bob ianmichell@ed Edit	ProcServe	1	13 January 2009
<input type="checkbox"/>	 Total Paper Supplies	123456778	Jimmy Gross JimGross@TPS.com Edit	ADAM BUYER ORG	2	22 February 2009

Your supplier(s) are now listed in the Supplier Management.

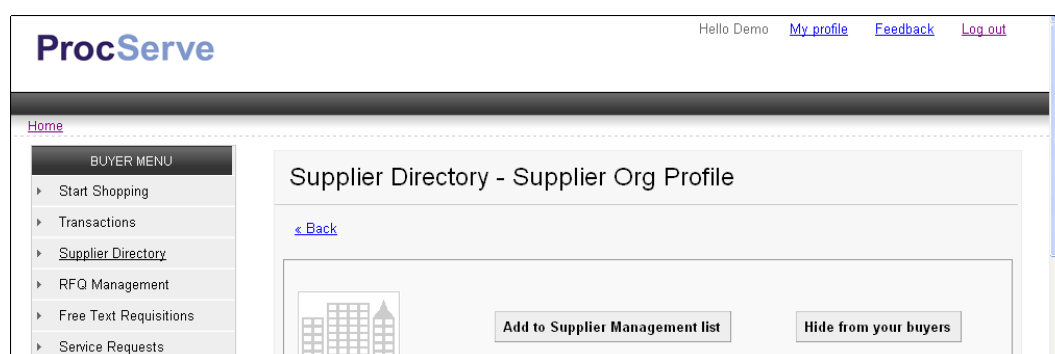
2.3.4.4 Adding a Supplier from Supplier Directory

Overview

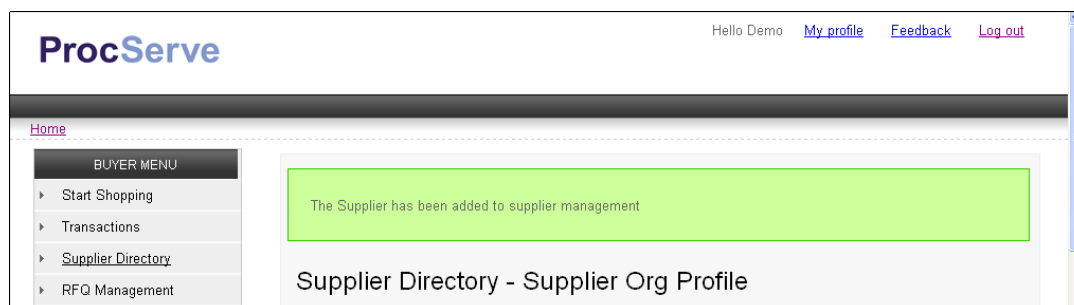
This topic shows you how to add a supplier, who already exists in the Supplier Directory in the Trading Network, to your Supplier Management console.

Locating the Suppliers to Add

1. Navigate Buyer Menu >> Supplier Directory



2. Click the 'Add to Supplier Management List' button



3. The supplier will now appear in your 'Search all invited suppliers' tab where you invite them via email to register.

3

Catalogue Shopping

3 Catalogue Shopping

3.1 Overview of Catalogue Searching

Overview

The search engine allows you to run to various types of search for items in the catalogues available to you. This section will provide you with a brief overview of how the search functionality works and give you some hints and tips on the best ways to use the search engine.

How does search work?

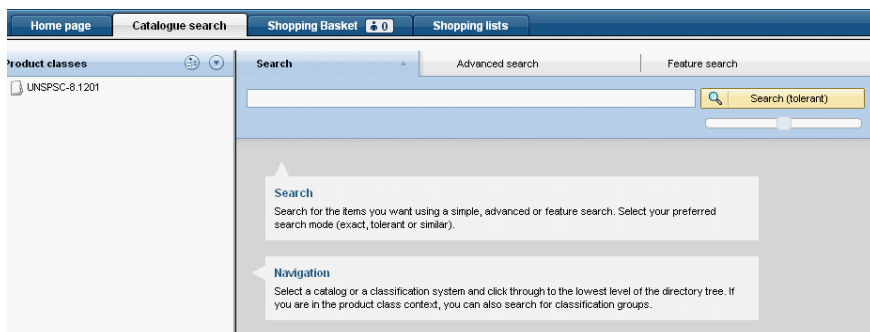
When a supplier creates a catalogue, they complete a template that mandates information put into key fields to fully describe the products or services that they provide. When you enter a search term, the search engine searches across some of these fields to ensure you return the best possible results.

The key fields that a supplier completes and the system searches across are:

- Supplier Item Number
- Item Short Description
- Item Long Description
- Supplier Name
- Manufacturer Item Number
- Manufacturer Name
- Item Keywords

When searching, the system allows you to adjust how the search works across the searchable fields by using the slider bar on the catalogues tab. Moving the slider bar will change how the system searches and will affect how many results are returned.

The slider bar has three settings and these are described below:



Exact	The search details you type in the search field must exactly match what is in the catalogue
Tolerant	The system will allow for some minor discrepancies including some common spelling mistakes e.g. recieved will find received
Similar	The system will use a wider scope and broaden the search based on the

information you used in the search field. For example, if you searched for **towel** you could return **trowel**.

This table below shows what fields are searched and how they are searched based on which slider bar setting is selected:

Slider bar setting	Item Number	Short Description	Long Description	Keywords	Supplier Name	Manufacturer Item Number	Manufacturer Name
Exact	Equal	Contains	Contains	Not Used	Equal	Equal	Equal
Tolerant	Begins With	Tolerant	Tolerant	Contains	Contains	Begins With	Contains
Similar	Begins With	Similar	Similar	Similar	Contains	Begins With	Contains

When a search term is entered, the results may include where the word(s) appear in any order in:

- **A single field**
- **Across one or more fields** (e.g. one word in short description and one word in supplier name).

Using the System – Example

You would like to order some A4 Books. You decide to type A4 Book in the search field and click search. The system will perform a search for each word individually and return items where one of the words exists in one of the searchable fields.

Some typical examples of the types of results you can expect to see from this search are below with the words returned by the search in **bold**:

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	A4 Paper	A4 Reams Note Pad in various sizes	Book and Paper Co	Paper, Reams
086-961	Reading Books	A5 & A4 Reading Books	Schools Supply Co	Book , reading, children
116-630	A4 Writing Pads		Schools Supply Co	Pad, recycled, a4, Book
Q3T376	Address Books	Hard Backed address book with tabs. Size A4	Book and Paper Co	
R5C945	A4 Books	A4 Size Books	Book and Paper Co	

Other Ways of Searching - Exact Word and Wild Card Search

There are some additional elements of functionality that can be used to enhance the search process

dependant on what you want to search for:

• Exact Word Search:

If you want to search for an exact word or words, you should place the word(s) in quotation marks. This will find the word(s) in the order entered within a single searchable field.

Using the same example as above, searching for "A4 Book" will bring back results from the highlighted columns as they are the only ones with the search term in a single field.

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	A4 Paper	A4 Reams Note Pad in various sizes	Book and Paper Co	Paper, Reams
086-961	Reading Books	A5 & A4 Reading Books	Schools Supply Co	Book , reading, children
116-630	A4 Writing Pads		Schools Supply Co	Pad, recycled, a4, Book
Q3T376	Address Books	Hard Backed address book with tabs. Size A4	Book and Paper Co	
R5C945	A4 Books	A4 Size Books	Book and Paper Co	

• Wildcard Search:

There are two variations on the wildcard search available to a user. A question mark is used to replace a single character and an asterisk is used to replace any number of characters.

Question Mark (?)

Use this to replace a single character within a search. Searching for **wh?te** will return results such as **white** and **whyte**.

Asterisk (*)

Use this to replace a string of letters either at the end or beginning of a word. Searching for **ave*** will return results such as **Avery** Labels, **average** contents and winged **avenger**. Searching for ***ave** will return results such as **Wave** Pens, Super **Save** Ltd and **rave** reviews.

3.2 How to Search

Overview – How To Search

This section shows you the various ways to use the search functionality.

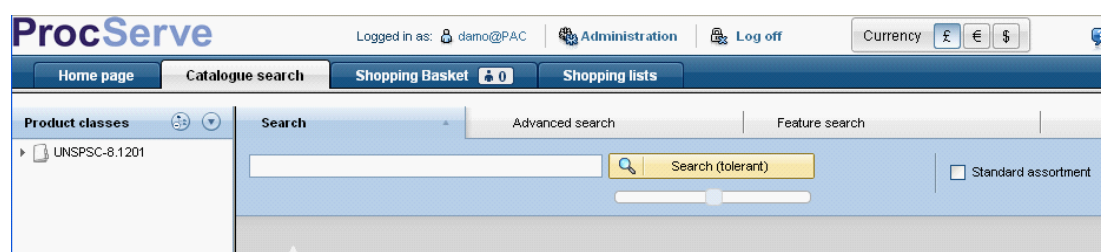
Locating the catalogue search feature

The following steps describe how you locate and use the catalogue search feature to create a requisition from a catalogue:

1. Punch-out from your P2P in to the Marketplace:

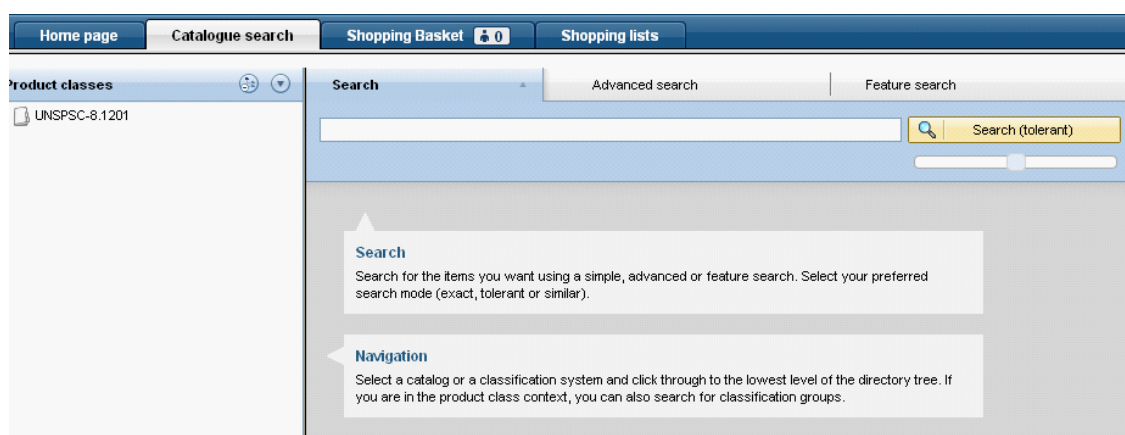
2. The catalogue is opened in a new window:

From here you can complete a simple keyword search in the search field.




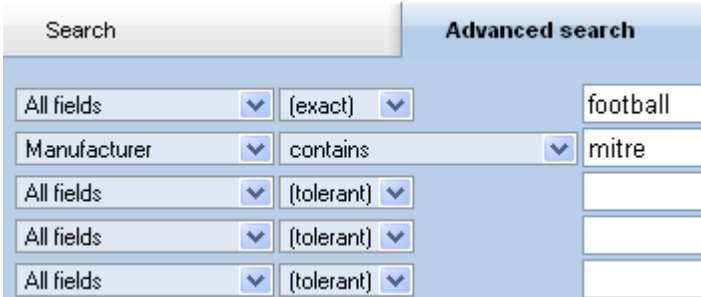

3. Using the Search Features to find your items:

Click the catalogue search tab:



The following list describes ways you can search:

Product Classes	<p>You can use the UNSPSC tree to the left of the search page to navigate through the folder structure to a Product Class in order to return the items classified within that Product Class as shown below. Note: Only UNSPSC codes which you have access to will be displayed.</p>
------------------------	--

	<ul style="list-style-type: none"> ▼ 16 Field and court sports equipment <ul style="list-style-type: none"> 00 Field and court sports equipment (uncoded) ▼ 15 Field sports equipment <ul style="list-style-type: none"> 00 Field sports equipment (uncoded) 02 Baseball gloves 03 Baseballs 04 Footballs
Search Tab	<p>A simple search allows you to locate items by entering keywords in the Search field and clicking the Search button.</p> 
Advanced Search	<p>The Advanced Search allows you to search specific fields and with conditions. Click the Advanced Search tab to display the advanced search fields and build your search rules as shown below.</p> 
Feature Search	<p>The Feature Search allows you to filter items within your Search results that meet certain criteria. To perform a Feature Search you need to select the Feature Search tab and a Product Class from the left hand pane, before selecting from the drop down boxes the features that you wish your items returned to contain as shown below:</p> 

Tip: The catalogue and or UNSPSC code must be assigned correctly in the Classification Views for you to be able to find it.

Tip: When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has been rebuilt. The Search Index is scheduled to run 23:00 daily. Once this is complete you can use the Search Tab to find items.

Tip: Only some catalogues will support feature search.

Tip: If you cannot found the items you wish to order - try the UNSPSC Tree search feature.

Tip: If you have too many items to work with you can filter your search using the Simple or Advanced Search features.

4. Filter on Search Results

When you search for a specific item, you will then see a filter option on the left hand side where there will be a number of options for you to choose from

Options include:

- A breakdown of items per catalogue
- A breakdown of items per supplier
- A breakdown of items per Manufacturer
- A breakdown of items per Lead Time
- Product Classes

The screenshot shows a search interface with a left-hand filter pane and a right-hand search results pane.

Search filter

Catalogues

- ☐ *Schools Davies Sports Cat1* (523)
- ☐ *Schools Supply Zone Cat* (202)
- ☐ *SCHSYPOCat1* (78)
- ☐ *Schools NES Arnold Cat1* (70)
- ☐ *Schools AtoZ Cat1* (58)
- ☐ *Schools GLS Education Cat1* (58)
- ☐ *Schools WNW Cat1* (58)
- ▶ More selection

Suppliers

- ☐ *Davies Sports* (523)
- ☐ *Supply Zone* (202)
- ☐ *YPO (Yorkshire Purchasing Organisation)* (78)
- ☐ *NES Arnold* (70)
- ☐ *GLS Educational Supplies* (58)
- ☐ *AtoZ* (58)
- ☐ *WNW* (58)
- ▶ More selection

Manufacturer

- ☐ *Not specified* (1,274)
- ☐ *MITRE* (12)
- ☐ *TALLON* (1)
- ☐ *Fellowes* (1)
- ▶ More selection

Search

football

▶ Search for: football





⚠ 1000 Items

Item no.
5000796
5000802
71.1560
160379

If you tick on one of the options in the filter results, you will be presented with more item details and further breakdown of information from chosen supplier:

For more information see 'The Item Details Page' section of this guide.

5. Working with the Search Results:

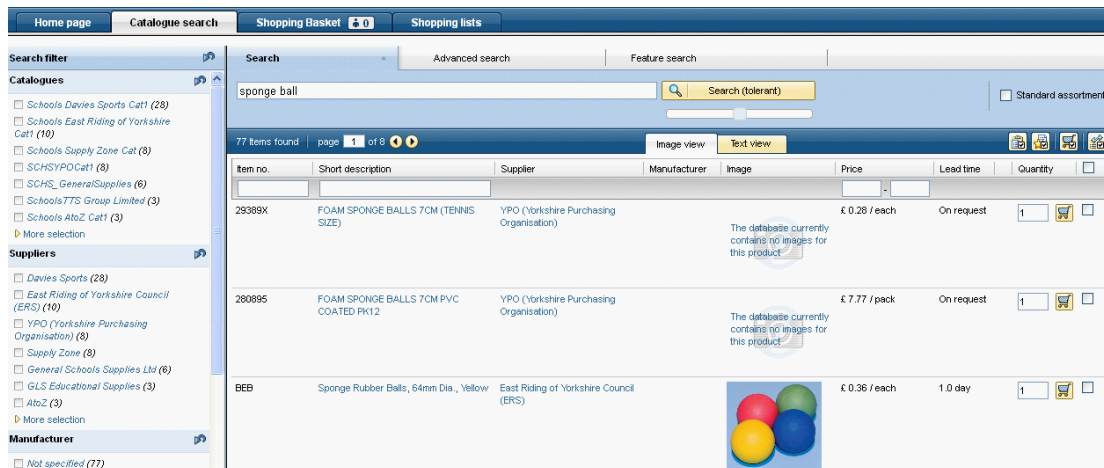
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later
Add to Comparison List		You can add all the checked items to a Comparison
Add to Favourites		You can add all the checked items to your Favourites List for future use
Add Selected Item(s) to cart		Check each item to be added and click the shopping cart icon

3.3 Examples of Searching

Here are some common examples of using the search system

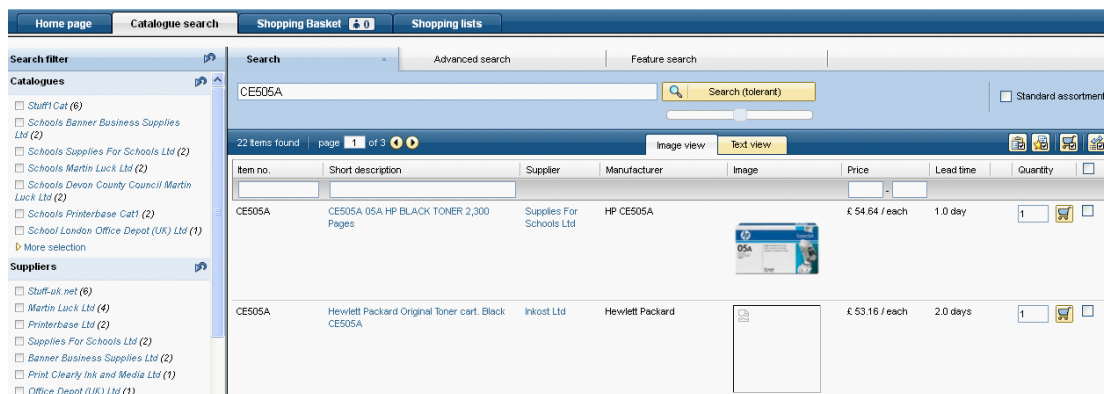
Q. I want to buy a sponge ball but am unsure exactly what type of sponge ball I want.

A. Try putting both words (sponge and ball) into the search box. Putting in just one of the words may make your search too wide.



Q. I need a toner cartridge for a HP LaserJet P2550d printer. The code on the cartridge is CE505A.

A. Try searching for the cartridge model number (CE505A). Put CE505A in the search field and this will return results with the product code anywhere within them.



Q. I want to buy some AA batteries from my local supplier Hills Components Limited.

A. You could try putting AA into the search field. This however would bring back too many results as the search term entered is too vague. You could try adding additional words to the search such as battery but this would also bring back items from suppliers you are not interested in.

To get a precise return, use the advanced search functionality. Put the words Hills and AA as shown in the example below making sure each term searches on the correct field.

Search **Advanced search** Feature search

Supplier contains Hills And ☐ Standard assortment




Short description contains AA And

All fields (tolerant) And

All fields (tolerant) And

All fields (tolerant) And

47 items found | page 1 of 5

021-4311	AA TO C SIZE BATTERY CONVERTER & AA 800mA BATTERY	Hills Components Limited		£ 0.90 / each	1.0 day	<input type="text" value="4"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Remove"/>
021-4339	AA + AAA RECHARGEABLE BATTERY PACK	Hills Components Limited		£ 7.95 / pack	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Remove"/>
02-5866-CQ	AA -1500 PROCELL BATTERY (BOX OF 100)	Hills Components Limited		£ 25.00 / box	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Remove"/>


Q. I have been asked to get some carbonless 2 ply paper in white/pink. I have been given the product code from the supplier's catalogue but have not been told the suppliers name.

A. Enter the product code into the search field. If the supplier has a catalogue on the system then the item will be returned.

Search **Advanced search** Feature search

☐ Standard assortment

6 items found

Item no.	Short description	Supplier	Manufacturer	Image	Price	Lead time	Quantity	
003R99107	003R99107 XEROX Premium Digital Carbonless Paper White/Pink A4 2-Ply 250 Sets	Supplies For Schools Ltd	XEROX 003R99107		£ 13.26 / each	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/> <input type="button" value="Remove"/>

Q. I need to find the price on an anemometer but am unsure how it has been spelt by the supplier.

A. Try searching using the beginning of the word then using the wildcard search tool. Put anem* into the search field. If this brings back too many results then consider adding extra letters to your search. This example will bring back items with the letters anem at the beginning of a word in the item data.

Search

Advanced search

Feature search

anem*







Search (tolerant)

☐ Standard assortment

23 items found | page 1 of 3

Image view

Text view

Item no.	Short description	Supplier	Manufacturer	Image	Price	Lead time	Quantity	
1BB	Anemometer	East Riding of Yorkshire Council (ERS)			£ 11.65 / each	1.0 day	1	
088059	Anemometer With Product Guide	WESTWARD PAPER SALES		 <div>The database currently contains no images for this product</div>	£ 14.70 / each	2.0 days	1	
461121	ANEMOMETER	YPO (Yorkshire Purchasing Organisation)		 <div>The database currently contains no images for this product</div>	£ 13.75 / each	On request	1	

3.4 The Items Details Page

Overview

This section describes how to use the Item Details page.

The Item Details page provides you with a detailed description of an item and a list of related items you may wish to consider.

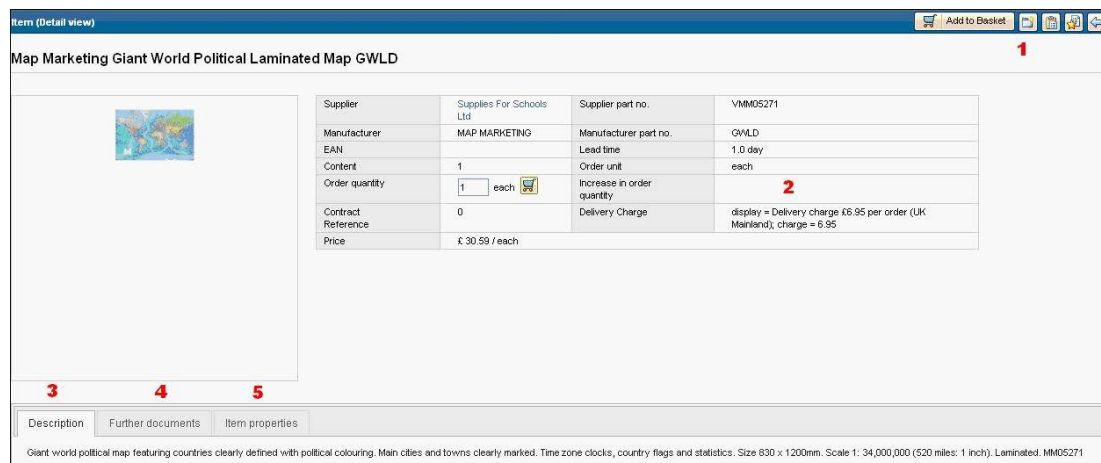
Locating the Item Details Page

The Item Details page is accessed from:

- **The Shopping Cart.** In the shopping cart click the short description to display item details in a popup window.
- **The Search Results List.** In the Search Results area click the short description to display item details in the Search Results area.

About the Item Details Page

The following image is an example of the Item Details page from an item in the Search area. The three numbered areas are (1) Action Icons; (2) Item Details; and (3) Associated Items. These are shown in greater detail below:



The following list describes the major features of Items details page:

(1) Action Icons: These icons are not displayed if the item is already in your Shopping Cart:

Add Item to Basket		Click to add item to your Shopping Basket
Open Items Details		Click to view item details in new window
Add to Favourites		Click to add item to your Favourites List
Add to Shopping List		Click to add item to your Shopping List
Return to Search Page		Click to return to Search Page

(2) Item Details: A summary of the item details. To view any associated documents click on any link in the Further Documents field.


Add to Shopping Cart	 Add to Basket	Click to add item to your Shopping Basket
----------------------	---	---

Note: In the Shopping Cart item details pop-up you cannot change the quantity.

(3) Description: This gives a more detailed description of the item.

(4) Further Documents: This may include additional images

(5) Item Properties: This may include further details of item

Add to Basket	 Add to Basket	Click to add item to your Shopping Basket
---------------	---	---

3.5 Comparing Items

Overview

This section describes how to compare items. You can build a list of items to be compared and compare one of the items against the others.





Building the Compare Item List

The following steps describes how you can add items to and use the Comparison List:

1. Locate the items you are considering purchasing.

2. Mark the items you wish to compare by selecting the right check box for each item:








For example:




283 items found page 1 of 29									
Image view Text view									
VMM30001	Map Marketing World Political Laminated Map BEX	Supplies For Schools Ltd	MAP MARKETING BEX		£ 17.95 / each	1.0 day	1		<input checked="" type="checkbox"/>
VMM05271	Map Marketing Giant World Political Laminated Map GVLD	Supplies For Schools Ltd	MAP MARKETING GVLD		£ 30.59 / each	1.0 day	1		<input checked="" type="checkbox"/>

3. Add Selected Items.










Click the Add Selected Items icon. Items details are listed in the Compare Items window:

	<input type="checkbox"/> Compare with this column  	<input type="checkbox"/> Compare with this column  
Short description	Map Marketing World Political Laminated Map BEX	Map Marketing Giant World Political Laminated Map GWLD
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

Tip: If you want to compare items on several different pages of the comparison list, you must click on  before you go to the next page otherwise your selection will be lost. The comparison list will be retained if you close the window with  or if you use the search function to create a new item list. You can open the comparison window again by clicking on .




4. Using the Compare Items List:

Compare with This Column Check Box. Check this box to highlight differences between this item and all other items.

	<input checked="" type="checkbox"/> Compare with this column  	<input type="checkbox"/> Compare with this column  
Short description	Map Marketing World Political Laminated Map BEX	Map Marketing Giant World Political Laminated Map GWLD
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

5. Differences are highlighted as shown in the above image.

6. On the Compare Page you can:

Remove Item		Click the Remove Icon to remove the relevant item from the Comparison List.
Add to Cart		Click the Add to Cart icon to add the relevant item to your shopping cart.
Empty Compare List		Click this icon to close the Comparison window and empty the Comparison List.

3.6 Smart Forms

Overview

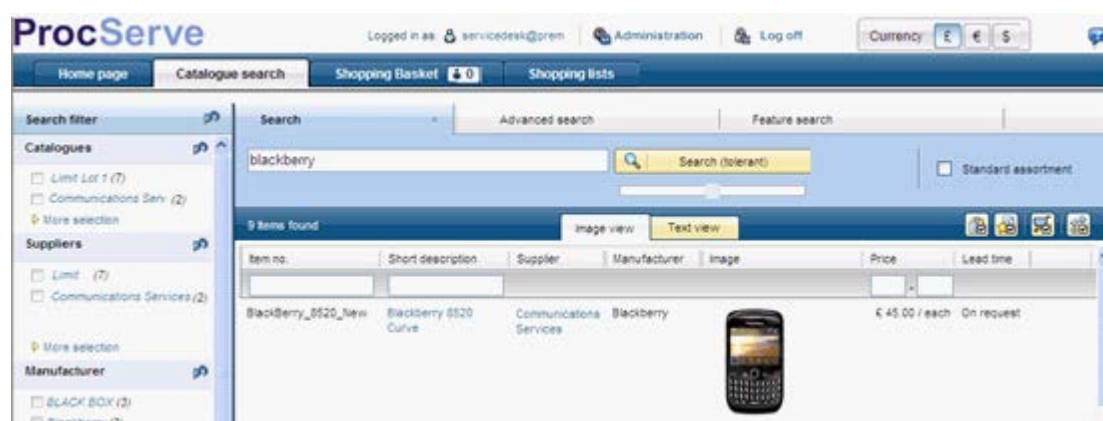
This section describes Smart Forms and how to use them.

What is a Smart Form?

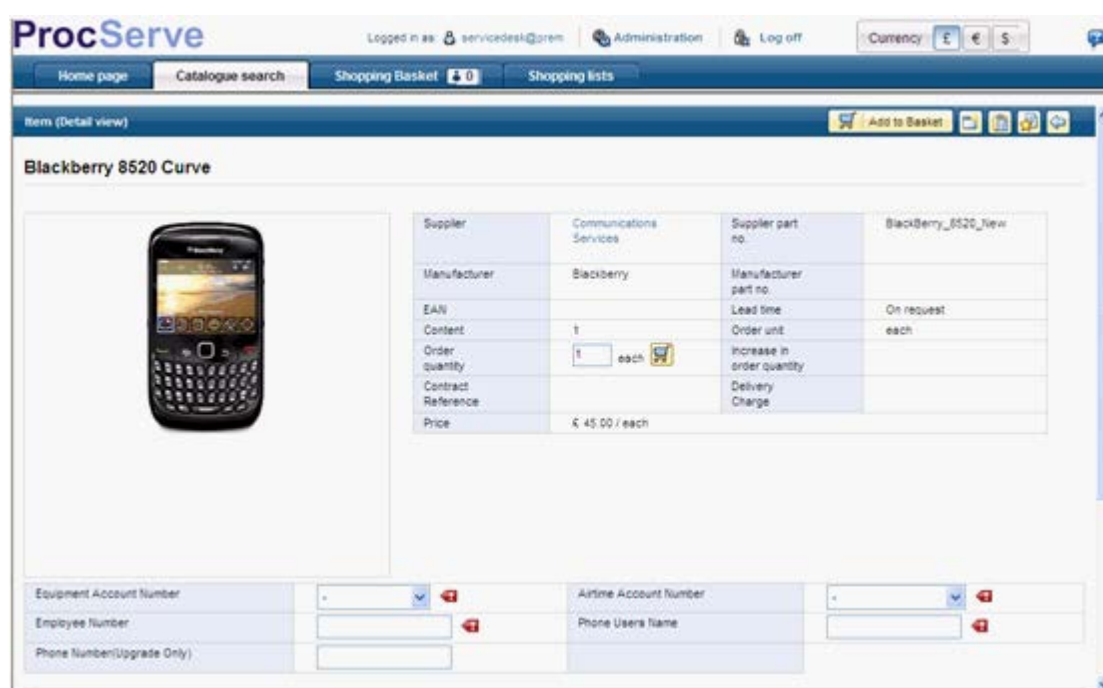
A Smart Form is used in certain catalogues to capture additional information that is typically unique to the particular purchase. Smart Forms enable the supplier to create user defined fields which can be either free text or drop down lists. Each field can be specified as either mandatory or optional with those fields that are mandatory needing to be completed before you can check out.

Completing the Smart Form?

The Smart Form is contained within the items details of the line item.



1. Clicking the link of an item will take you in to the details



2. The Smart Form details can then be completed as required

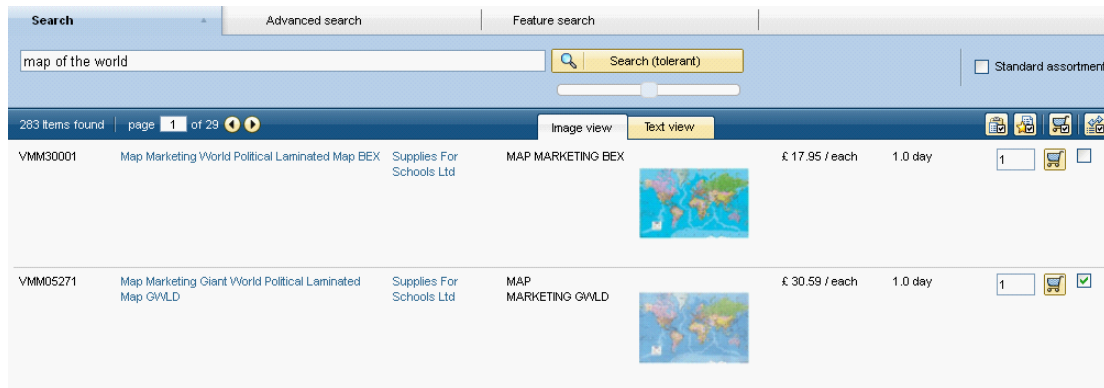
3.7 Adding Items to your Shopping Cart

Overview

This section describes how you add items to your Shopping Basket and manage your shopping cart.

1. Adding Items to your Cart:

Having found the item or items you wish to add to your requisition in the Search page you can now add them to your cart:



2. If required you can change the quantity and check the box in the right hand column:

If you only require this item then you can add item to shopping basket by clicking on the Shopping Basket icon



, or if more than one item is ticked on you can click on the Add Selected Items To Shopping Basket Tab



If you want to continue shopping, you can simply search for another item and repeat above process.

3. When you add items to your shopping cart the shopping cart tab will flash for a short while and will be updated with the number of items you added:

For example if you added an item to your shopping cart that already had an item in it the new total will be two:

4. Reviewing Shopping Cart:

You can review and update your shopping cart and when you are satisfied with the items send the requisition. At any time during shopping you can click the shopping cart tab to view the contents:

The shopping cart contains the items you have selected for your requisition. You can continue shopping by clicking the catalogue search tab at any time.

You can add or remove items from your cart, change quantities or cancel the purchase.

Also note that delivery charge if applicable, will be included in the shopping basket tab

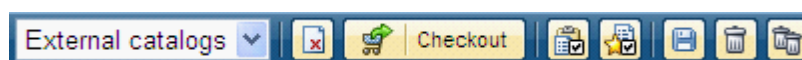


The table below highlights the additional options available to you when working with the Shopping Cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase, click the Cancel Purchase icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.

6. Checkout:

When you have checked that the items you wish to order are OK you are ready to click the checkout button.



Note: The order will not be sent to the supplier until your requisition has been approved.

Note: Shopping Basket Caching - Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.









7. If your Checkout is successful:

You will be redirected to your P2P or back office system.

3.8 Working with your Shopping Cart

Overview





You can make changes to your cart, cancel the purchase or send the requisitions using the cart. The following list provides a description of the components of the shopping cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase click the Cancel Purchase icon.
Add Multiple Item(s) to cart		Check each item to be added and click the multiple shopping cart icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.
Checkout	 Checkout	Click this icon when you are ready to send the requisition. The requisition will now be available for the authoriser to import into your back office for approval

You may also notice a number of icons next to specific items. These are used by suppliers, where relevant, to enhance specific items:

The following is a guide to icons you may see on the marketplace:

Central Hub Item		Content from this icon is from Mandated Contracts. UK Public Sector Organisations only.
Collaborative-Content		Item is part of Collaborative Contract or Framework Agreement

Core-Item		Core-Item within a contract
Environmentally-Friendly		Items showing this icon are recyclable, bio-degradable, carbon neutral or otherwise Environmentally Friendly.
Hazardous-Item		Items displaying this icon are Hazardous Materials (HazMat).
Price-Break		Price Breaks occur when you receive a discount for buying larger quantities of this item.
Required Associated Item(s)		A Required Associated Item(s) is an item which MUST be purchased if the original item is purchased.
Optional Associated Item(s)		Optional Associated Item(s) are not automatically added to shopping basket.

3.9 Working with Favourites

Overview

This section describes how to work with your favourite items.

Your Favourite items are available as a list on your Home page. You use favourites to add items you order frequently.

Adding to Favourites

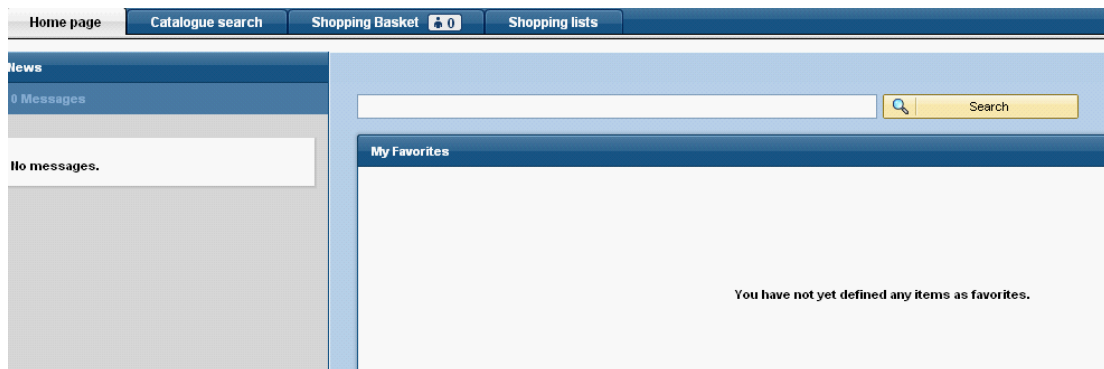
The following steps describe how you add and work with favourites:

1. You can add to your favourites whenever you see this icon:

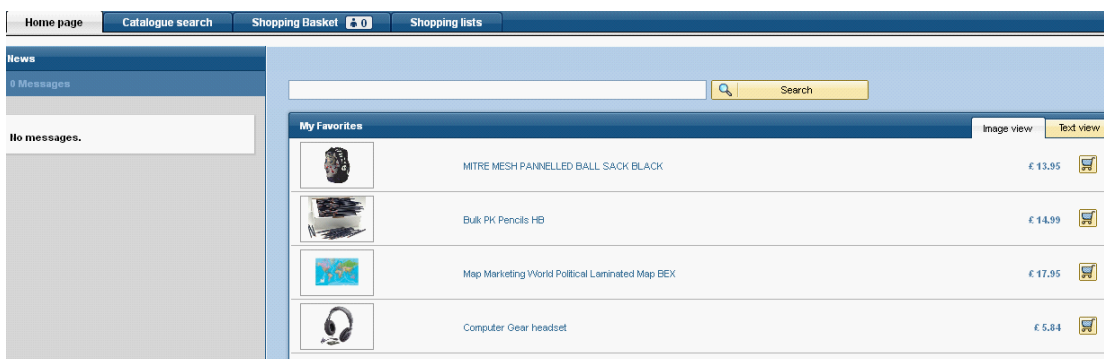


2. The Home Page Favourites List

Favourites are shown on the landing page of the ProcServe Catalogue System.











The Home Page will always display **You have not yet defined any items as your favourites** until an item is added:







3. The following describes how you work with the Home Page Favourites List:

- **Image View and Text View.** You can switch between a view that includes the item images and a text view. The image view is shown in the above image. Text view does not show any images:

Image View

My Favorites		Image view	Text view
	MITRE MESH PANNELLED BALL SACK BLACK	£ 13.95	
	Bulk PK Pencils HB	£ 14.99	
	Map Marketing World Political Laminated Map BEX	£ 17.95	
	Computer Gear headset	£ 5.84	

Text View

My Favorites			Image view	Text view
MITRE MESH PANNELLED BALL SACK BLACK		£ 13.95		
Bulk PK Pencils HB		£ 14.99		
Map Marketing VWorld Political Laminated Map BEX		£ 17.95		
Computer Gear headset		£ 5.84		

• **Item Details.** Click an Item description to view the Item details.

• **Add Item to Shopping Cart.** Click this icon



Add to Basket to add the item to your Shopping Cart.

4. Working With Your Favourites List.

You can delete items, add multiple items to the Shopping Cart or add items to a Shopping List using the Favourites List within the Shopping Lists tab.

5. In the Catalogue navigate Shopping Lists >> My Favourites:


Home page Catalogue search Shopping Basket 0 Shopping lists									
My favorites									
Item no.	Short description	Supplier / Service provider	Lead time	Price	Quantity	Amount			
PSGD80301	MITRE MESH PANNELLED BALL SACK BLACK	Davies Sports	4 days	£ 13.95 / each	1	£ 13.95	<input type="checkbox"/>		
GP500HB	Bulk PK Pencils HB	MERSEYSIDE PAPER SUPPLIES	1 day	£ 14.99 / pack	1	£ 14.99	<input type="checkbox"/>		
VMM30001	Map Marketing VWorld Political Laminated Map BEX	Supplies For Schools Ltd	1 day	£ 17.95 / each	1	£ 17.95	<input type="checkbox"/>		
A0376598	Computer Gear headset	Equanet	5 days	£ 5.84 / each	1	£ 5.84	<input type="checkbox"/>		

6. The following list describes how you work with the Favourites:

• **Update Quantity.** You can change the Quantity for an item and click the Save icon (see below). The new quantity is saved for later use. You can also update the quantity prior to adding to your Shopping Cart.

• **Mark Item.** To mark an item for deletion or adding to a Shopping List or cart you check the box in the right hand column. You can mark as many items as you like.

Save Changes		Save changes to your Favourites.
Delete Items		Delete items that have a Tick in the checkbox from your Favourites.
Add to Shopping List		You can add all the checked items to a Shopping List

		which you can change and re-use later
Add Item(s) to Cart		Check each item to be added to your cart and click the multiple Shopping Cart icon

3.10 Working with Shopping Lists

Overview

This section describes how to work with your Shopping Lists.

A Shopping List allows you to save items so that you can quickly create a requisition at a later date. For example, if you create a monthly artistic supplies requisition you can save all the items in a Shopping List, add to the shopping cart and then review and send the requisition.

Adding Items to Your Shopping Lists

1. Whilst shopping you can add to your Shopping List by clicking this icon



The following list describes how to use this page:

Create New Shopping List		To create a new Shopping List enter a name and description in the relevant fields. The new Shopping List is displayed.
Add to Shopping List		Add the items to the relevant Shopping List. The existing Shopping List is displayed with item(s) added.
Back Icon		Return to the previous page. Changes are not saved.

2. Locating your Shopping Lists:

Click Shopping Lists tab:

Home page	Catalogue search	Shopping Basket 0	Shopping lists																
<div> <div>shopping lists</div> <div> <input type="checkbox"/> Company shopping lists <input type="checkbox"/> Group shopping lists <input checked="" type="checkbox"/> Private shopping lists <input type="checkbox"/> My favorites </div> </div> <div> <div>Private shopping lists</div> <table> <thead> <tr> <th>Last modified</th><th>Name</th><th>Description</th><th>Mark</th></tr> </thead> <tbody> <tr> <td>Aug 5, 2011</td><td>fortnightly stationery order</td><td>Order fortnightly starting 08/08</td><td><input type="checkbox"/></td></tr> <tr> <td>Aug 5, 2011</td><td>Computing accessories</td><td>General computer goods</td><td><input type="checkbox"/></td></tr> <tr> <td>Aug 5, 2011</td><td>Sporting goods</td><td>Regularly ordered sporting items</td><td><input type="checkbox"/></td></tr> </tbody> </table> </div>				Last modified	Name	Description	Mark	Aug 5, 2011	fortnightly stationery order	Order fortnightly starting 08/08	<input type="checkbox"/>	Aug 5, 2011	Computing accessories	General computer goods	<input type="checkbox"/>	Aug 5, 2011	Sporting goods	Regularly ordered sporting items	<input type="checkbox"/>
Last modified	Name	Description	Mark																
Aug 5, 2011	fortnightly stationery order	Order fortnightly starting 08/08	<input type="checkbox"/>																
Aug 5, 2011	Computing accessories	General computer goods	<input type="checkbox"/>																
Aug 5, 2011	Sporting goods	Regularly ordered sporting items	<input type="checkbox"/>																

3. About the Shopping List Page.






The following list describes the Shopping List:

Company Shopping List	These are for use throughout the organisation. Note: Only catalogue administrators can create, edit and delete these lists.
Group Shopping List	These are for use by groups of users. Note: Only authorised employees can create and change these lists.
Private Shopping List	These are shopping lists you create for your own use. Note: Only you can create and change these lists.

4. Working with Shopping Lists.

The following list describes how you work with shopping lists:

Open Shopping List		You can click the Name link for a Shopping List to
---------------------------	--	--

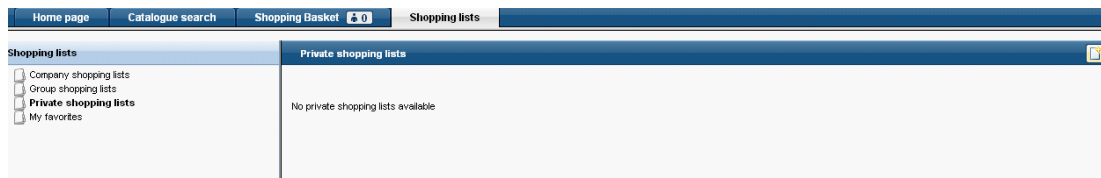
		display the items
Marking Shopping List		You mark an item by checking the relevant Mark box in the right hand column.
Replace Shopping Cart with Marked Items		Replace the entire Shopping Cart with all marked Shopping Lists.
Add Marked Shopping Lists to Shopping Cart		Add the all items from all marked Shopping Lists to your current Shopping Cart.
Delete Marked Shopping Lists		Delete all marked Shopping Lists. A prompt is displayed. Click the OK button to delete the marked Shopping Lists.
Create Shopping List		Create an empty Shopping List for future use

5. Create New Shopping List

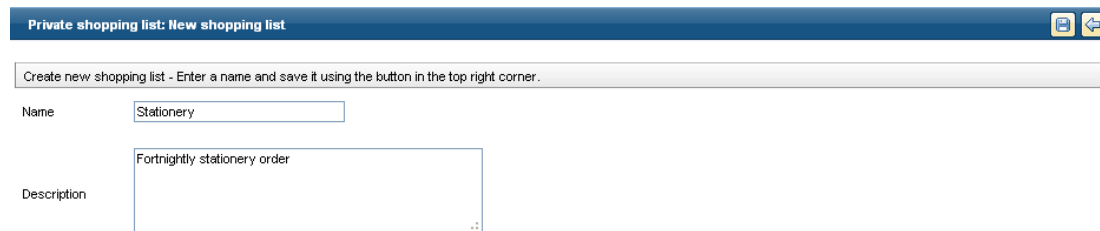
You can create an empty Shopping List for future use. Click this icon



to display these fields:



Where you can then enter the Shopping List details:



The following list describes how you work with the create Shopping List page:

Name	Enter a name for the new Shopping List.
Description	Enter a description for the new Shopping List.
Save Icon	Click the Save icon to validate, and if valid, save the new Shopping List.






There are no items in this new Shopping List. You will need to add items to this Shopping List if you wish to use it.

6. Working with Shopping List Items.

When you click on the name link for a Shopping List the contents of the list are displayed:

Private shopping list: fortnightly stationery order							
Item no.	Short description	Supplier / Service provider	Lead time	Price	Quantity	Amount	
VRX13485	Rexel Agenda2 Stationery Sorter Charcoal 2101037	Supplies For Schools Ltd	1 day	£ 10.13 / each	<input type="text" value="1"/>	£ 10.13	<input type="checkbox"/>
WX21718	Gel Pens Red	MERSEYSIDE PAPER SUPPLIES	1 day	£ 2.95 / pack	<input type="text" value="1"/>	£ 2.95	<input type="checkbox"/>
WX26040	Ball Pens Black	MERSEYSIDE PAPER SUPPLIES	1 day	£ 1.98 / pack	<input type="text" value="1"/>	£ 1.98	<input type="checkbox"/>
012426	30CM WHITE RULERS PACK OF 100	The Consortium for Purchasing and Distribution Ltd	2 days	£ 12.99 / pack	<input type="text" value="1"/>	£ 12.99	<input type="checkbox"/>
C20	C20 Erasers	MERSEYSIDE PAPER SUPPLIES	1 day	£ 2.25 / pack	<input type="text" value="1"/>	£ 2.25	<input type="checkbox"/>
MYA3	Mycopy A3 copier paper	MERSEYSIDE PAPER SUPPLIES	1 day	£ 4.75 / ream	<input type="text" value="1"/>	£ 4.75	<input type="checkbox"/>

The following list describes how you use the Shopping Items list page:

Show Item Details	You can click the Short Description for an item to view item details.
Quantity	You can change the quantity for an item.
Marked Box	Check the box for each item you to apply a particular action to (for example deletion or add to favourites).
Save Changes	 Click this icon to save any changes to your Shopping List.
Delete Selected Items	 Click this icon to delete all selected items. A prompt is displayed. Click the OK button to delete the selected items. Click the Cancel button to cancel the deletion
Add Selected Items to Favourites	 Click this icon to add all selected items to your Favourites.
Add Selected Items Shopping Cart	 Click this icon to add the all items from all marked Shopping Lists to your current Shopping Cart.
Back Icon	 Click the Back icon to return to the Shopping Lists page. Changes are not saved

3.11 Double Punch-out Sites

Overview

Punch out means you can go to a suppliers eProcurement site, shop and bring your items back to your shopping cart.

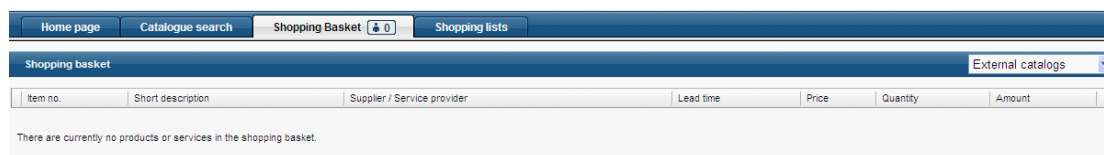
Whilst punch out sites can be provided for any Supplier they are commonly used when a standard catalogue may not be appropriate because of the need to personalise or configure a purchase e.g. a computer could be customised by adding extra memory or a larger hard disk.

Locate and Open the Shopping Cart

The following steps describe how you punch out to an external Supplier site from the ProcServe Marketplace.

1. Click the Shopping Cart tab

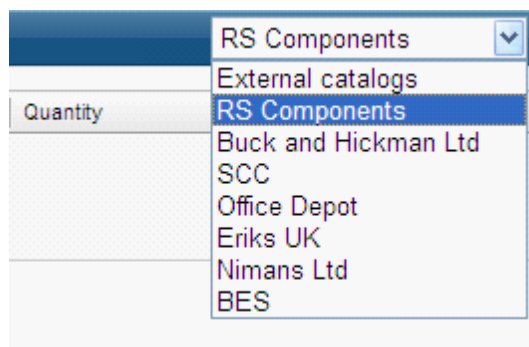
2. The Shopping Cart is displayed:



Note: The above image shows an empty Shopping Cart. The cart could also have other items in it.

3. The External Catalogues Drop Down

Open the external catalogues drop-down list:



4. Select one of the External Suppliers from the drop down.
5. The selected Suppliers website will open in a new window.
6. Shop online with this Supplier as you usually would.
7. When you have finished your external shopping you can checkout.
8. The items you chose are displayed in Shopping Cart.
9. You can continue to shop or work on your Shopping Cart.

4

Catalogue Management

4 Catalogue Management

4.1 Catalogue Management Introduction

Overview

Suppliers can provide buying organisation's catalogues which allow buyers to easily search for and select items to add to requisitions.

Before a supplier is able to provide catalogue content, they must be invited to the ProcServe Trading Network and be registered as a bronze supplier.

There are 3 different types of catalogues a buying organisation may have access to:

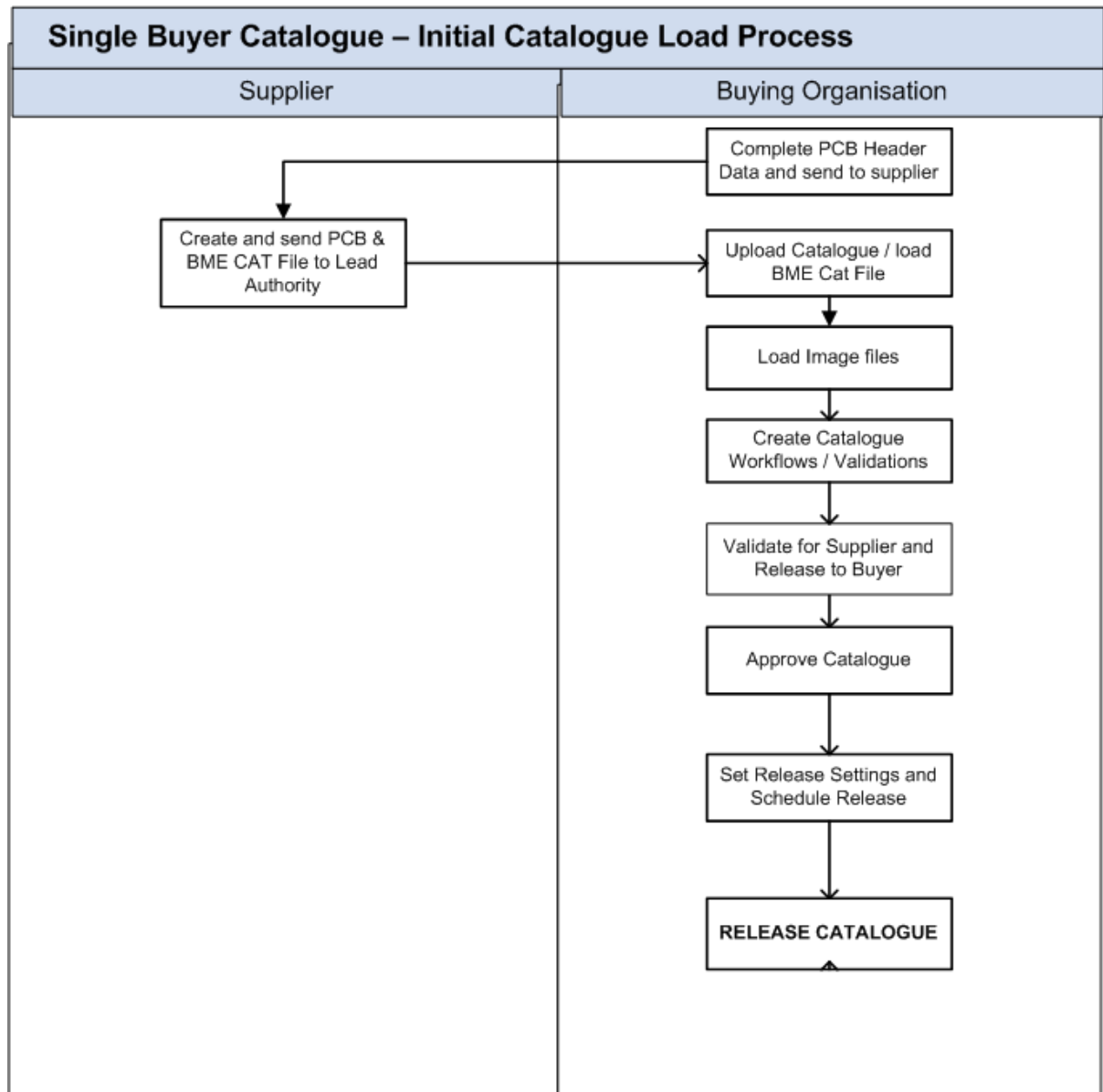
Single Buyer Catalogue	Catalogue is for a single buying organisation only.
Multi-Buyer Catalogue	Catalogues can be shared amongst selected buying organisations.
Public Catalogue	Catalogues are made available to all buying organisations. This is only available to a few organisations and is not covered by the content of this manual.

Note: Some of the sections within Catalogue Management may not be relevant to you dependant on your organisation set up.

4.2 Single Buyer Catalogue Initial Load

4.2.1 Overview

This section describes the process of loading and configuring a catalogue for a single buying organisation using the Catalogue Management.



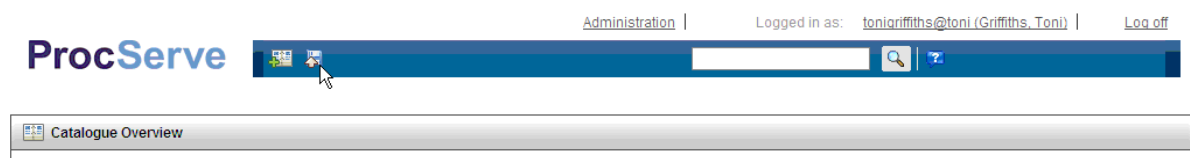
4.2.2 Importing the Catalogue

The following steps describe how you upload and configure a catalogue for the first time.

1. Navigate Admin Menu >> Catalogue Management:

The catalogue manager is displayed.

2. Click on Import Analysis:



3. Import the BMECat File:

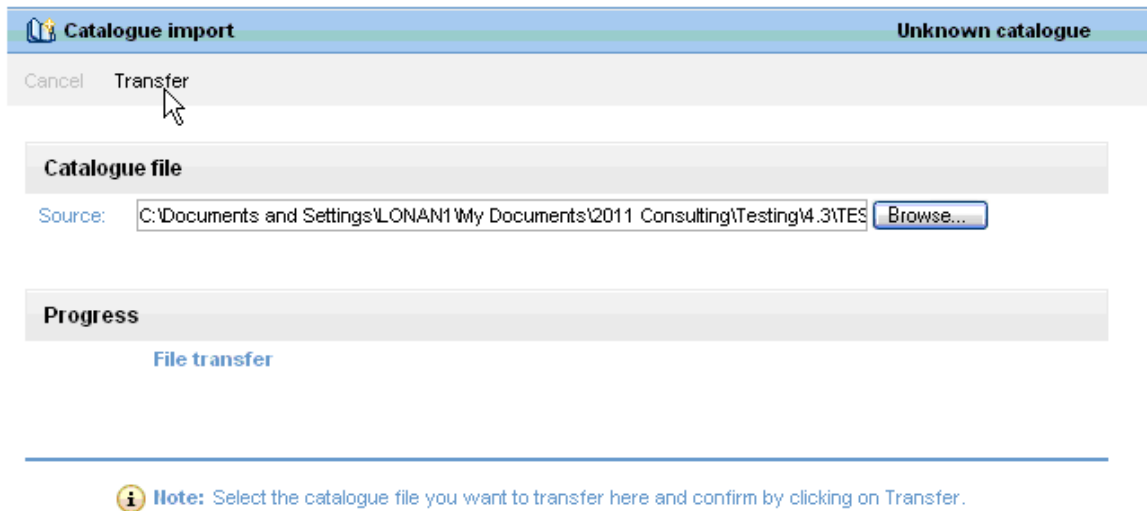
In the Import Analysis page click the Browse button or enter a path and file name in the source field.

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

A screenshot of the 'Catalogue import' dialog box. The title bar says 'Catalogue import' and 'Unknown catalogue'. Below the title bar are 'Cancel' and 'Transfer' buttons. The main area is divided into sections: 'Catalogue file' with a 'Source:' label and a text input field, and a 'Browse...' button; 'Progress' with a 'File transfer' status bar. At the bottom, there is a note: 'Note: Select the catalogue file you want to transfer here and confirm by clicking on Transfer.'

4. Click on Transfer in the top left corner:

Importing the Catalogue



Catalogue import Unknown catalogue

Cancel Transfer

Catalogue file

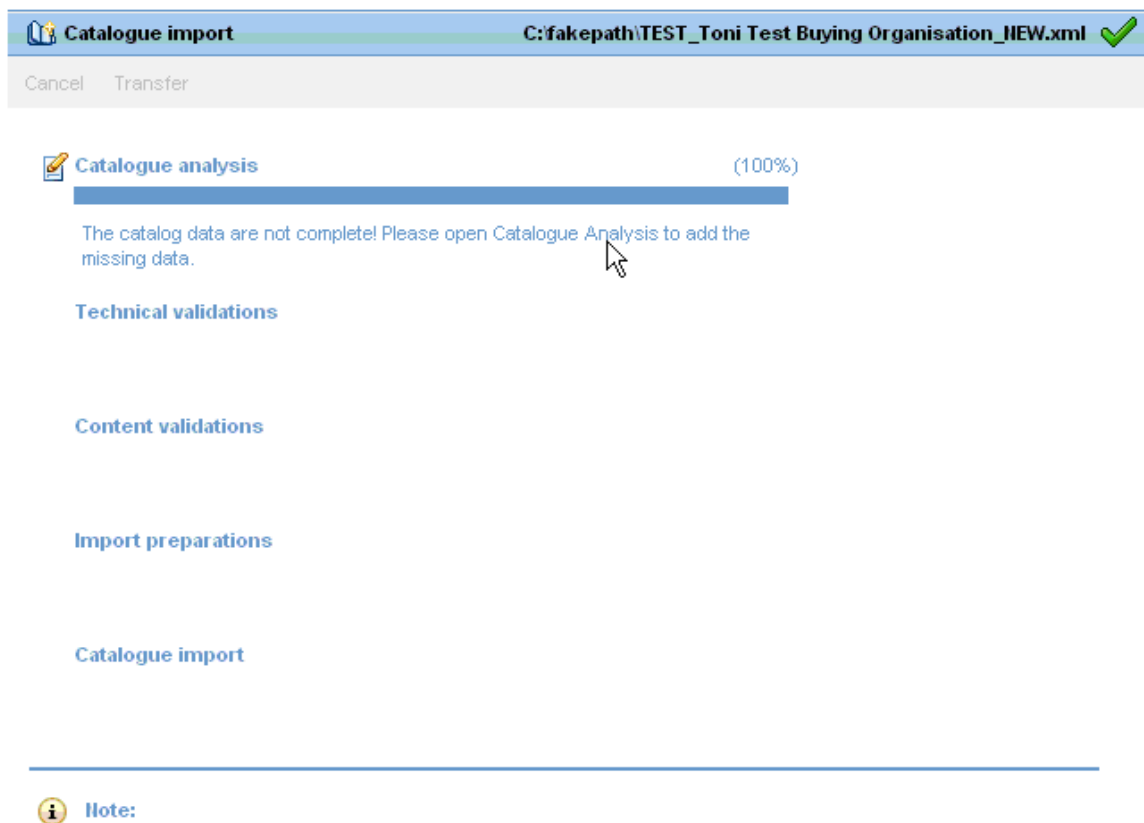
Source: C:\Documents and Settings\LONAN1\My Documents\2011 Consulting\Testing\4.3\TES Browse...

Progress

File transfer

Note: Select the catalogue file you want to transfer here and confirm by clicking on Transfer.

5. During the import process, catalogue manager will stop the import and you will be prompted to run a catalogue analysis. **Click on the catalogue analysis link:**



Catalogue import C:\fakepath\TEST_Toni Test Buying Organisation_HIEW.xml ✓

Cancel Transfer

Catalogue analysis (100%)

The catalog data are not complete! Please open Catalogue Analysis to add the missing data.

Technical validations

Content validations

Import preparations

Catalogue import

Note:

6. Verify the details in the catalogue analysis pop up window:

Importing the Catalogue

Catalogue analysis Unknown catalogue

Delete Cancel Continue analysis

Catalogue recipient - buyer		
	Catalogue data	System data
Buyer name:	ZZBar 43 Multi Buyer Test	ZZBar 43 Multi Buyer Test
	Found	

Supplier		
	Catalogue data	System data
Supplier name:	PServe 4.3 Test Supplier	PServe 4.3 Test Supplier
	Found	

Catalogue		
	Catalogue data	System data
Catalogue identifier:	ZZM1_PS43_333_1	ZZM1_PS43_333_1
Catalogue name:	ZZM143_PS43_333	ZZM143_PS43_333
	Not found	

Catalogue statistics

Done Internet 100%

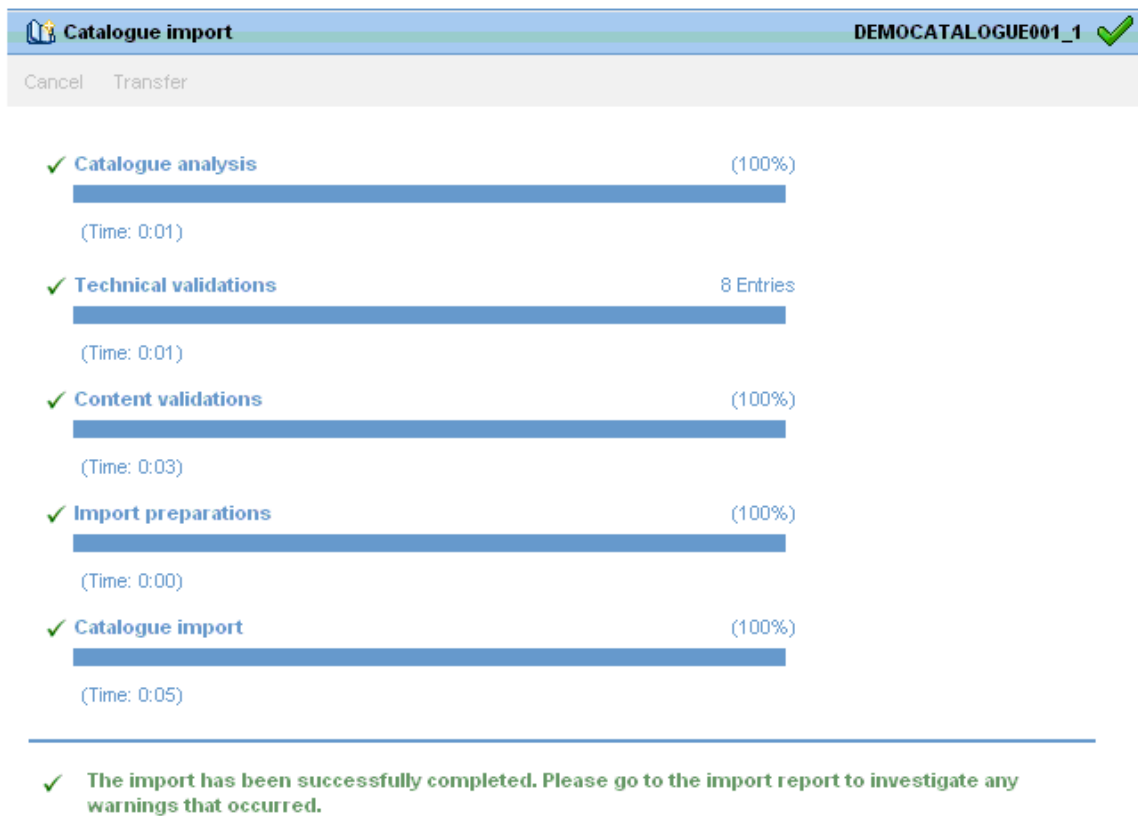
Note: Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the ProcServe Catalogue Builder and reload the file.

Note: The catalogue should be 'Not Found' which is correct as its a new catalogue.

7. Click on Continue Import

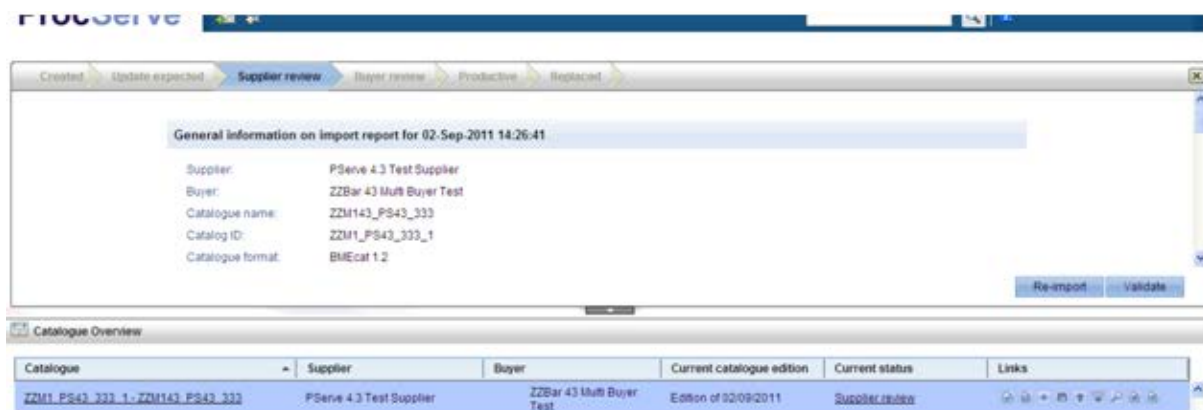
8. Once the import is successfully completed the confirmation screen is displayed:

Importing the Catalogue



9. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

10. The catalogue will now be in Supplier Review:



Select Validate to run the validation report and then select Release to Buyer.

Importing the Catalogue

ProcServe

Created Update expected **Supplier review** Buyer review Productive Replaced

General information on validation report for 02-Sep-2011 14:36:35

Supplier:	PServe 4.3 Test Supplier
Buyer:	ZZBar 43 Multi Buyer Test
Catalogue name:	ZZM143_PS43_333
Catalog ID:	ZZM1_PS43_333_1

Re-import Validate Release to buyer

11.The catalogue will now be in Buyer Review:.

Administration | Logged in as: [tonigriffiths@toni \(Griffiths, Toni\)](#) | [Log off](#)

ProcServe

Catalogue Overview

Catalogue	Supplier	Buyer	Current catalogue ed	Current status	Links
DEMOCATALOGUE001_1 - DEMO Catalogue 1	TEST	Toni Test Buying Organisation	Edition of 22/07/2011	Buyer review	

4.2.3 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling). **Note:** The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.

1. Select the catalogue workflow option:



2. Set up the email settings as required. Search for the relevant organisation on the top right:

3. Click on the relevant users and click on the select button (repeat as necessary):

Configuring Catalogue Workflow

The screenshot displays the 'Workflow' configuration page. On the left, a vertical list of workflow stages includes 'Update expected', 'Import blocked', 'Supplier review', 'Buyer review', 'Release scheduled', 'Productive', and 'Replaced'. The 'Release settings' tab is active. The 'Search' section shows 'Organization' set to 'TEST'. The 'Search results' list contains 'System, Administrator (Premium Content Manager)'. Below this is a 'Select' button. The 'Selection' section shows 'Griffiths, Toni (TEST)' with a 'Deselect' button highlighted by a mouse cursor. A 'Save' button is located at the bottom right.

4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):

This screenshot is identical to the one above, showing the 'Workflow' configuration page. It highlights the 'Deselect' button in the 'Selection' section, which is being clicked by a mouse cursor. The 'Search results' list still shows 'System, Administrator (Premium Content Manager)', and the 'Selection' list shows 'Griffiths, Toni (TEST)'. The 'Save' button remains at the bottom right.

You need to set users for all 7 sections:

- o Update Expected (Supplier Super User)
- o Import Blocked (Supplier Super User)
- o Supplier Review (Supplier Super User)
- o Buyer Review (Buyer Super User)
- o Release Scheduled (Buyer Super User)
- o Productive (Buyer Super User)
- o Replaced (Buyer Super User)

5. Ensure that the Automation settings are set as required (Click on Automation Settings)

Workflow	
E-mail settings	Automation settings
Automated import:	<input checked="" type="checkbox"/>
Automated validation supplier:	<input type="checkbox"/>
Automated validation buyer:	<input type="checkbox"/>
Automated release:	<input type="checkbox"/>
Automated update expected:	<input checked="" type="checkbox"/>

Save

Note: Suggested setting for standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

Configuring Catalogue Workflow

Workflow

E-mail settings Automation settings Release settings

Release mode: New and replace

Scheduling: As soon as possible

Time (e.g. 23:00):

Create search database: Create incrementally

Save

6. Click on Save

7. Click on close or click outside of the catalogue

4.2.4 Validating your Catalogue

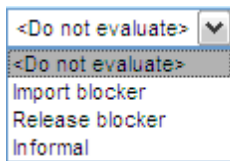
The catalogue will automatically inherit the standard validation that has been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

1. Amending the validation profile from your standard profile

Select the validation profile icon for your catalogue



To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon

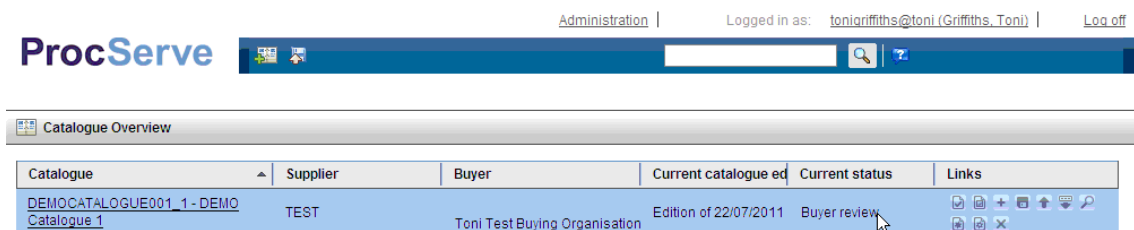


Change the required details and click on save

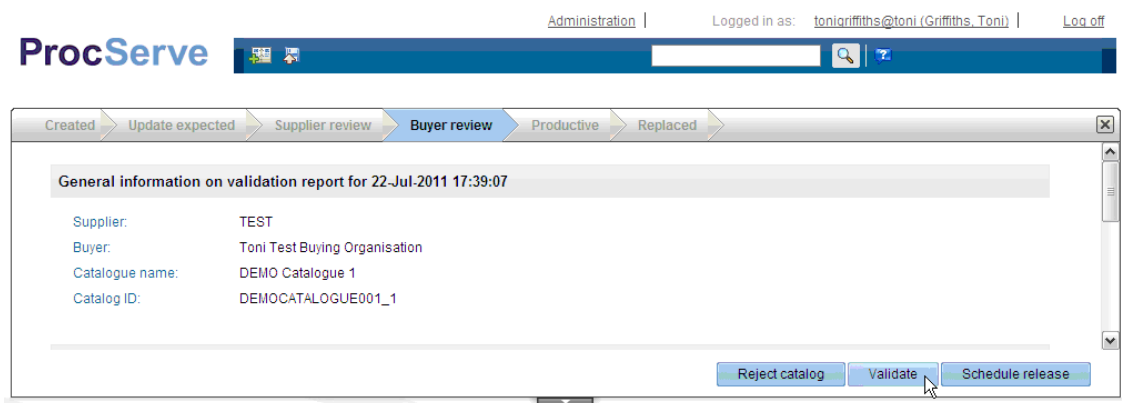
Tip: Ensure you give the rule a meaningful name so that others can recognise what that rule checks for

Tip: Do not amend rules as this amends the rule for all catalogues and organisations on the system.

2. Click on the Buyer Review status link for the catalogue:



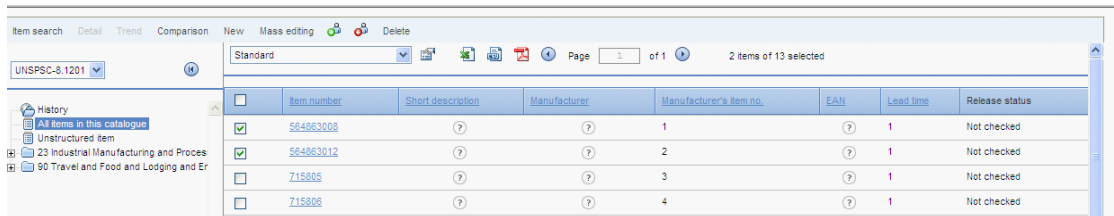
3. Select Validate to validate the catalogue against the validation rules set for this catalogue:



4.2.5 Approving your Catalogue

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer icon to review the catalogue items



<input type="checkbox"/>	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

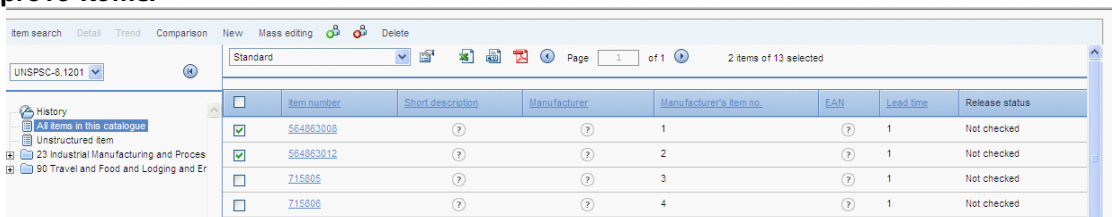
2. You can now approve and/or reject the items loaded:

Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



<input type="checkbox"/>	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

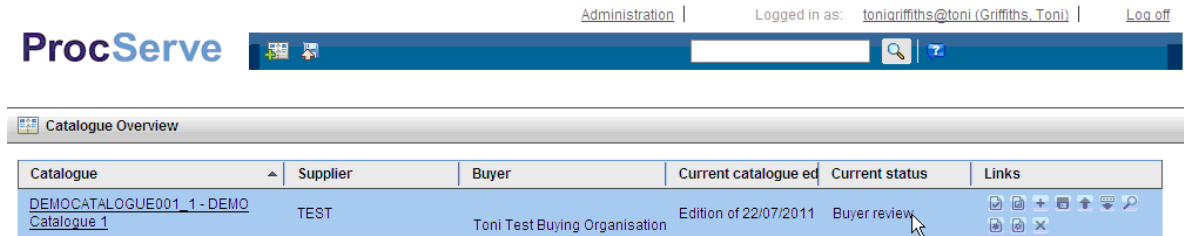
Note: If changes are required then you can both amend through the ProcServe Catalogue Manager Catalogue explorer interface, or via the ProcServe Catalogue Builder and re-import the file.

Note: Any new file imported will over write the old data where the header data is the same.

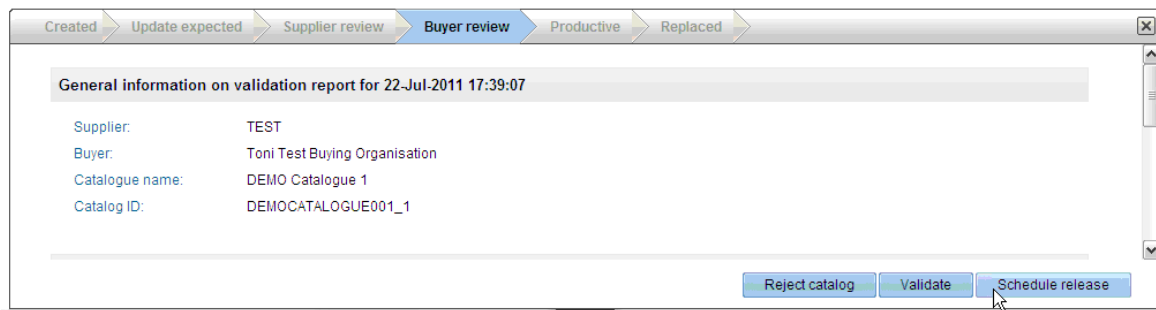
4.2.6 Exporting your Catalogue

You can now release your catalogue.

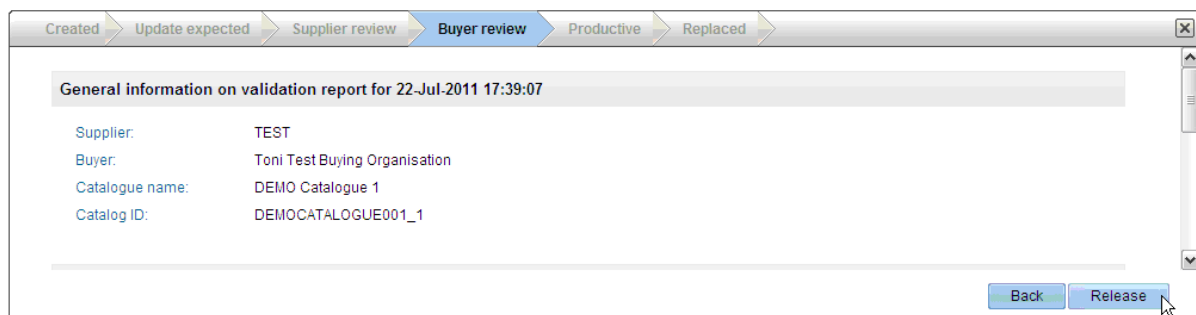
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

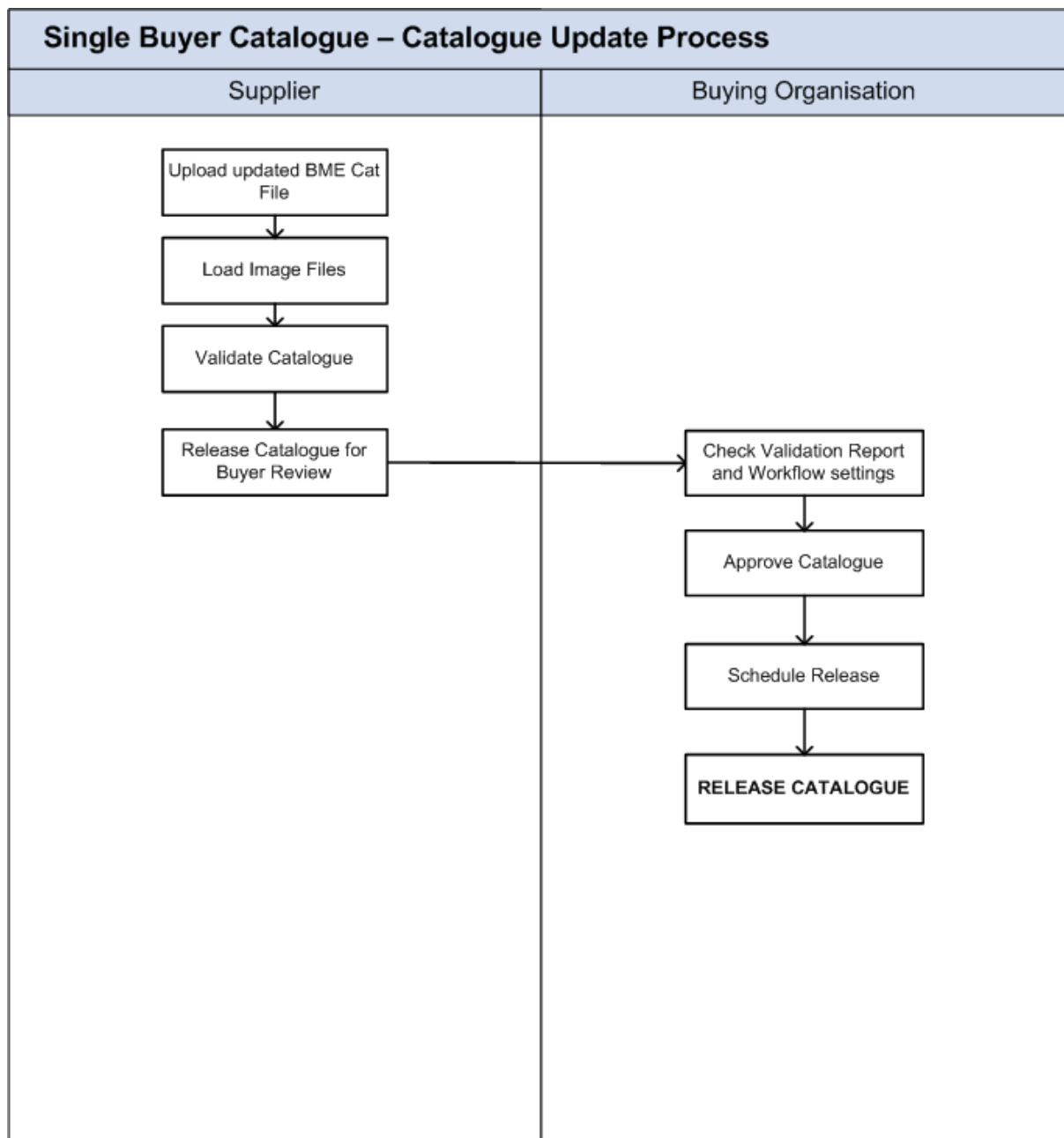
4.3 Single Buyer Catalogue Updates

4.3.1 Overview

This section describes the process a supplier will follow to load catalogue updates using a BMECat file.

Note: The updated load of a catalogue is normally performed by a supplier. Should you need to update a catalogue, for any reason, the below steps can be followed.

If the supplier is performing the update, please go to the Approving your Catalogue and Exporting your Catalogue within the multi-buyer catalogue section.

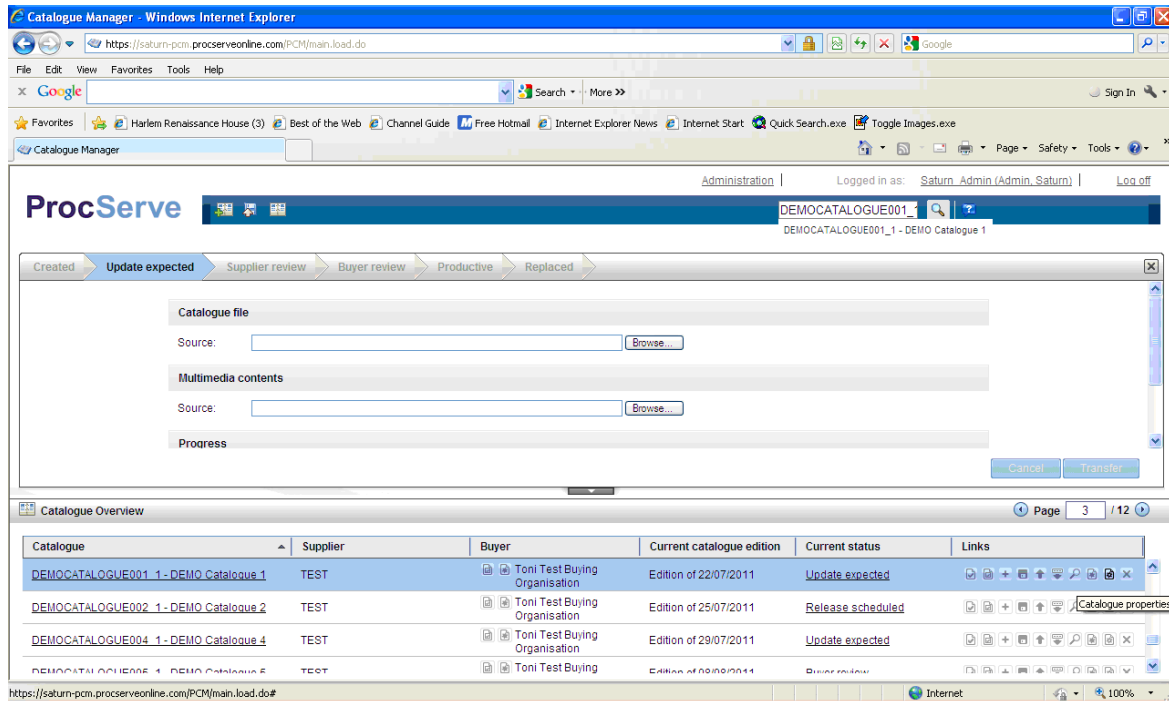


4.3.2 Importing the Updated Catalogue

The following steps should be completed by the supplier:

1. Navigate Admin Menu >> Catalogue Management.

2. The Catalogue Manager is displayed. Select the Catalogue and the actions that can be completed at this stage will be available.

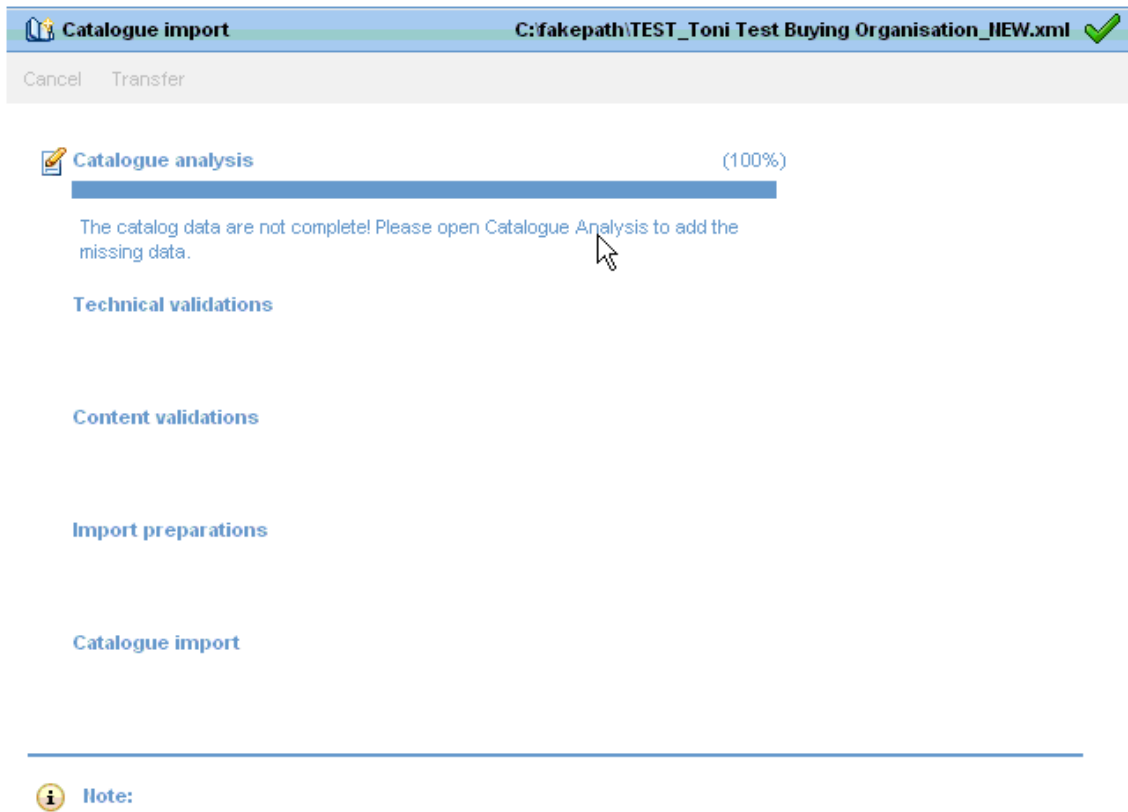


3. Import BMECat File. Click the browse button on the catalogue file path:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

4. Click the Transfer button in the right.

Importing the Updated Catalogue



5. The Summary page is displayed:

6. Once the import is successfully completed the confirmation screen is displayed:

Importing the Updated Catalogue

Catalogue import DEMOCATALOGUE001_1 ✓

Cancel Transfer

- ✓ **Catalogue analysis** (100%)
(Time: 0:01)
- ✓ **Technical validations** 8 Entries
(Time: 0:01)
- ✓ **Content validations** (100%)
(Time: 0:03)
- ✓ **Import preparations** (100%)
(Time: 0:00)
- ✓ **Catalogue import** (100%)
(Time: 0:05)

✓ **The import has been successfully completed. Please go to the import report to investigate any warnings that occurred.**

7. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

Note: Depending on the workflow configured for this catalogue, the catalogue will now go to Supplier Review. An email will be sent to the nominated supplier user to prompt them to complete this.

Administration | Logged in as: [tonigriffiths@toni \(Griffiths, Toni\)](#) | [Log off](#)

ProcServe

Catalogue Overview

Catalogue	Supplier	Buyer	Current catalogue ed	Current status	Links
DEMOCATALOGUE001_1 - DEMO Catalogue 1	TEST	Toni Test Buying Organisation	Edition of 22/07/2011	Buyer review	

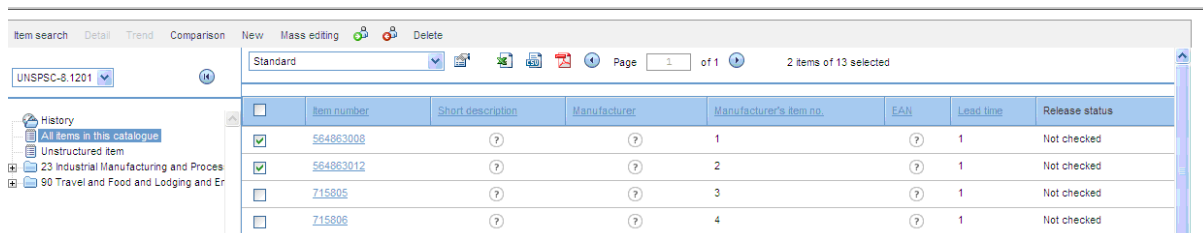
Buyer Review: Once a supplier has performed the upload they will release the catalogue to buyer review. The ProcServe Catalogue Management System will automatically email you, providing the workflow was correctly configured, so you can complete the rest of the process.

4.3.3 Approving your Catalogue

The buyer review is now required. The buyer contract manager will need to check and then approve the items / catalogue.

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from Links.



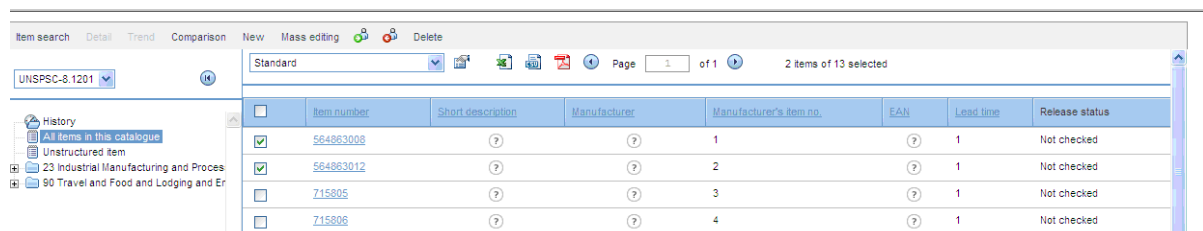
	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

2. You can now approve and/or reject the items loaded: Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

3. When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

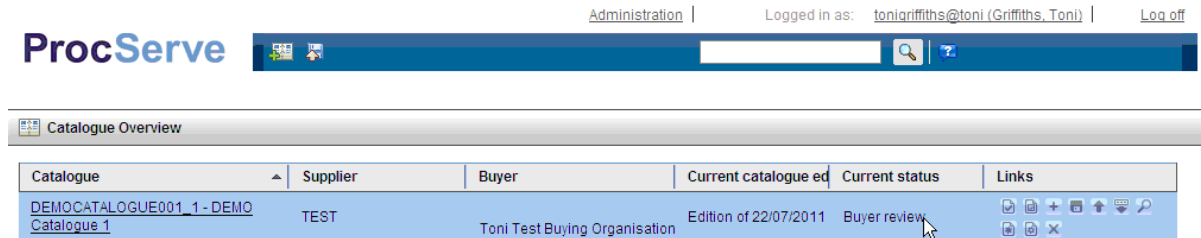
Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

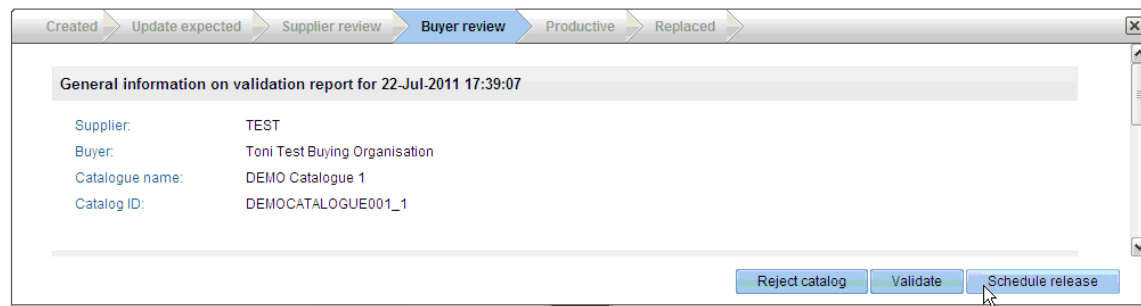
4.3.4 Exporting your Catalogue

You can now release your catalogue.

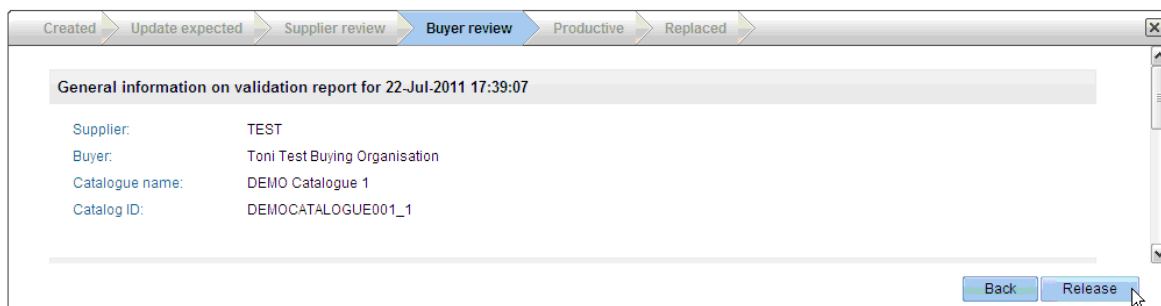
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

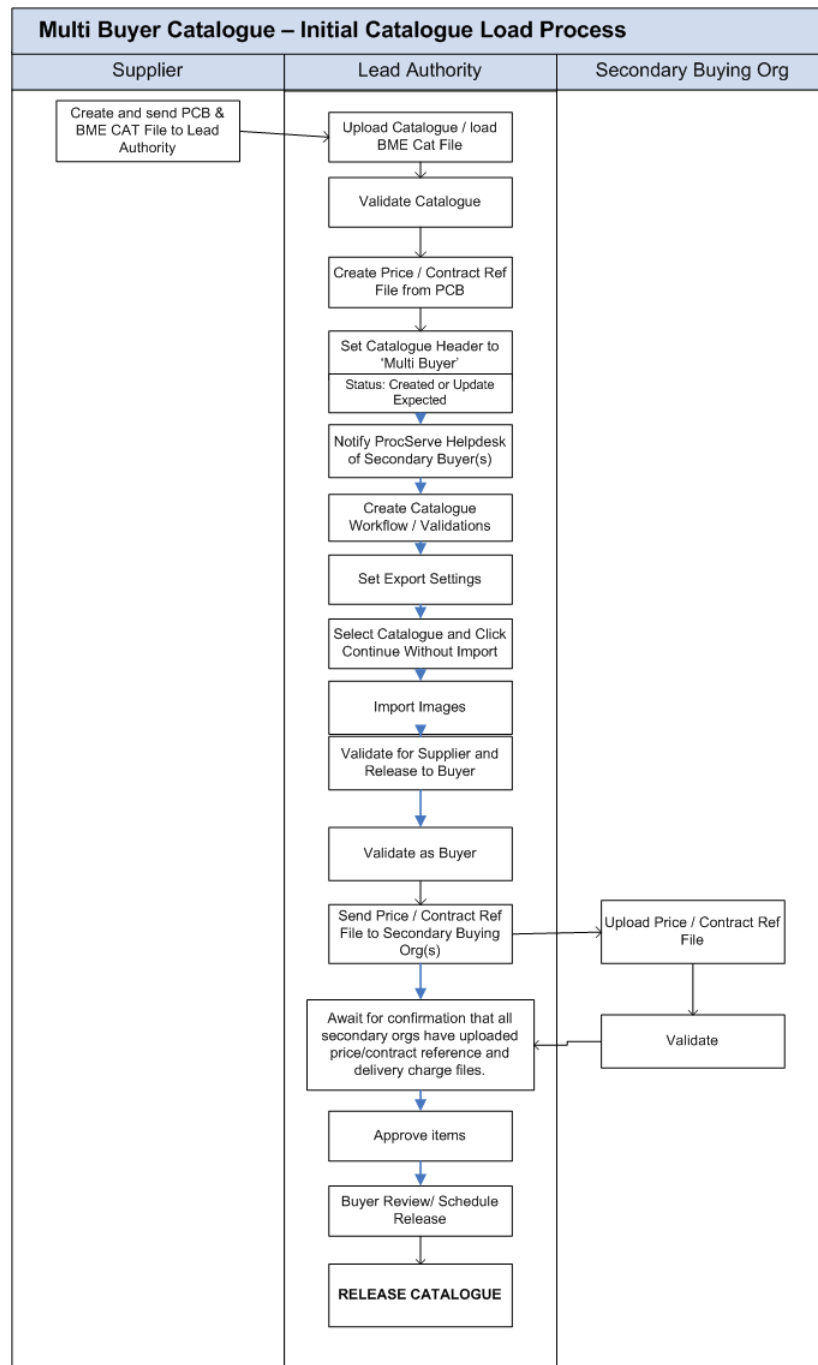
The catalogue Status will now change to 'Update Expected'.

4.4 Multi-Buyer Catalogue - Load and Configure Initial Catalogue Load

4.4.1 Overview

This section refers to catalogues that are used by more than one organisation.

To utilise the multi buyer catalogue feature you will need to obtain the catalogue from the supplier. From this you can create a price file and if required a contract reference file to be used by any further buying organisations (referred to as secondary buying organisations).



4.4.2 Importing your Catalogue (BMECat File)

If the catalogue is new then the multi-buyer process can begin with the initial upload of the BMECat file. If you are converting an existing private catalogue, then please read the next section in this chapter.

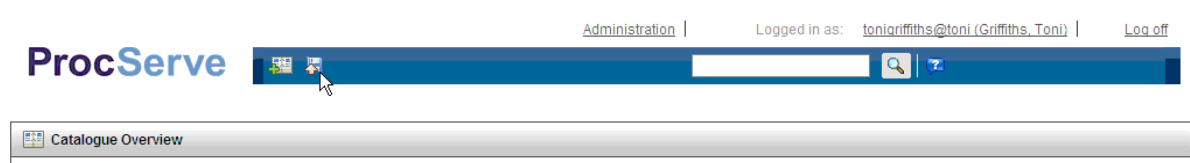
Importing your Catalogue (BMECat File)

After the has been checked and the BMECat file is ready for upload to ProcServe you need to use the Catalogue Manager to upload and configure the imported catalogue.

1. Navigate Admin Menu >> Catalogue Management

The Catalogue Manager is displayed.

2. Select the Import Analysis Icon:



3. Import BMECat File:

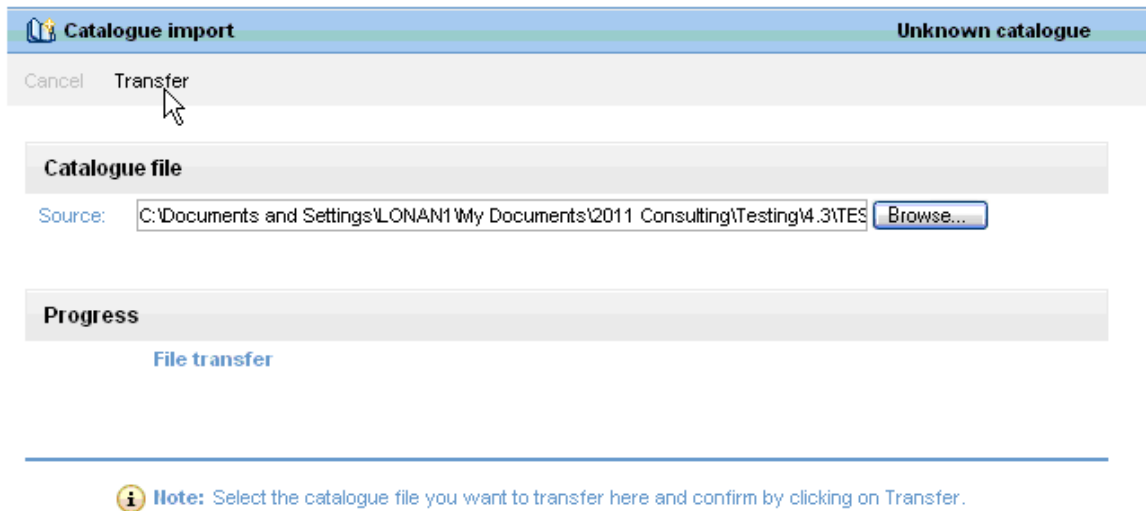
In the Import Analysis page click the **Browse** button or enter a path and file name in the source field

Note: Select the catalogue file you want to transfer here and confirm by clicking on Transfer.

4. Click the Transfer button in the top left:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

Importing your Catalogue (BMECat File)



Catalogue import Unknown catalogue

Cancel Transfer

Catalogue file

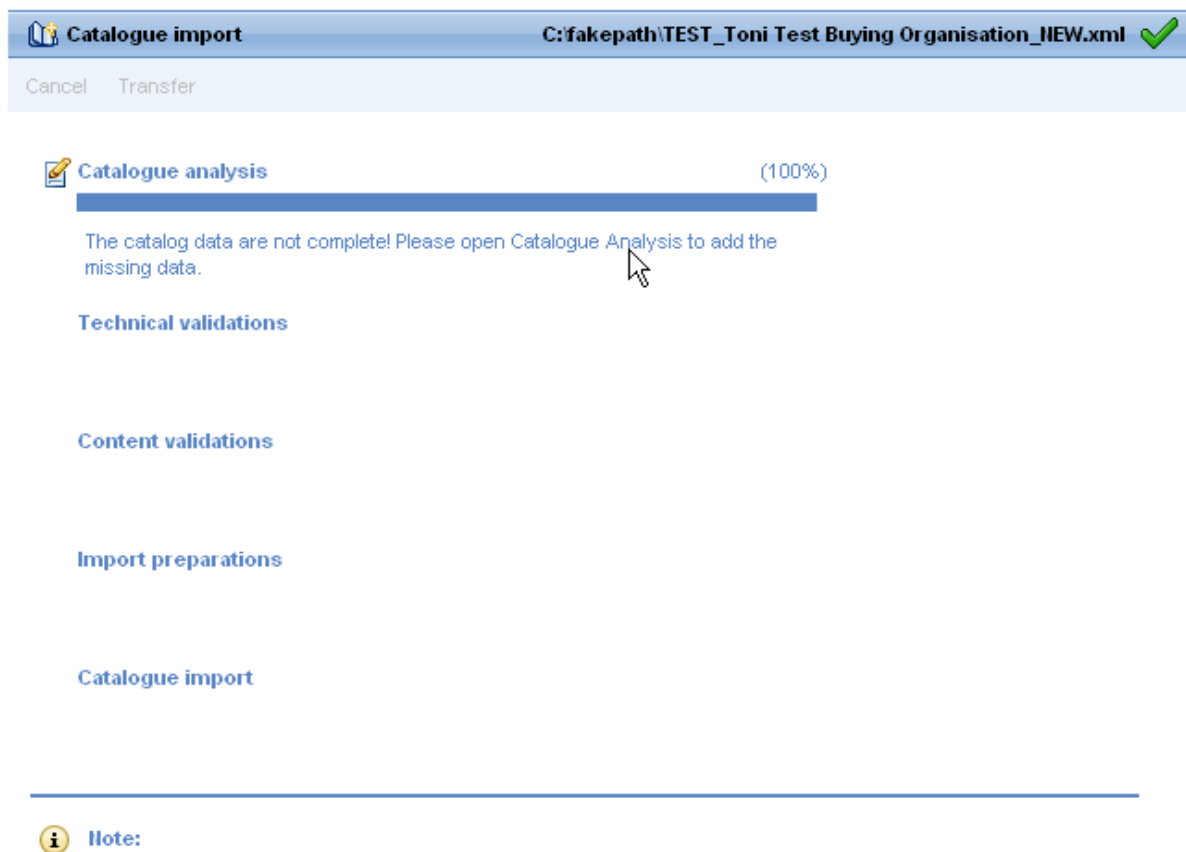
Source: C:\Documents and Settings\LONAN1\My Documents\2011 Consulting\Testing\4.3\TES Browse...

Progress

File transfer

Note: Select the catalogue file you want to transfer here and confirm by clicking on Transfer.

5. During the import process Catalogue Manager will stop the import and you will be prompted to run a Catalogue Analysis - click on the Catalogue Analysis link:



Catalogue import C:\fakepath\TEST_Toni Test Buying Organisation_NEW.xml ✓

Cancel Transfer

Catalogue analysis (100%)

The catalog data are not complete! Please open Catalogue Analysis to add the missing data.

Technical validations

Content validations

Import preparations

Catalogue import

Note:

6. Verify the details in the Catalogue Analysis pop up window:

Importing your Catalogue (BMECat File)

Catalogue analysis - Windows Internet Explorer
 https://preprod-pcm.procservonline.com/PCM/Upload/showAnalyse.do?importID=229633&useDataFromSystem=1&mainWindowType=pc

Unknown catalogue

Delete Cancel Continue analysis

Catalogue recipient - buyer		
	Catalogue data	System data
Buyer name:	ZZBar 43 Multi Buyer Test	ZZBar 43 Multi Buyer Test
	Found	

Supplier		
	Catalogue data	System data
Supplier name:	PServe 4.3 Test Supplier	PServe 4.3 Test Supplier
	Found	

Catalogue		
	Catalogue data	System data
Catalogue identifier:	ZZM1_PS43_333_1	ZZM1_PS43_333_1
Catalogue name:	ZZM143_PS43_333	ZZM143_PS43_333
	Not found	

Catalogue statistics

Done Internet 100%

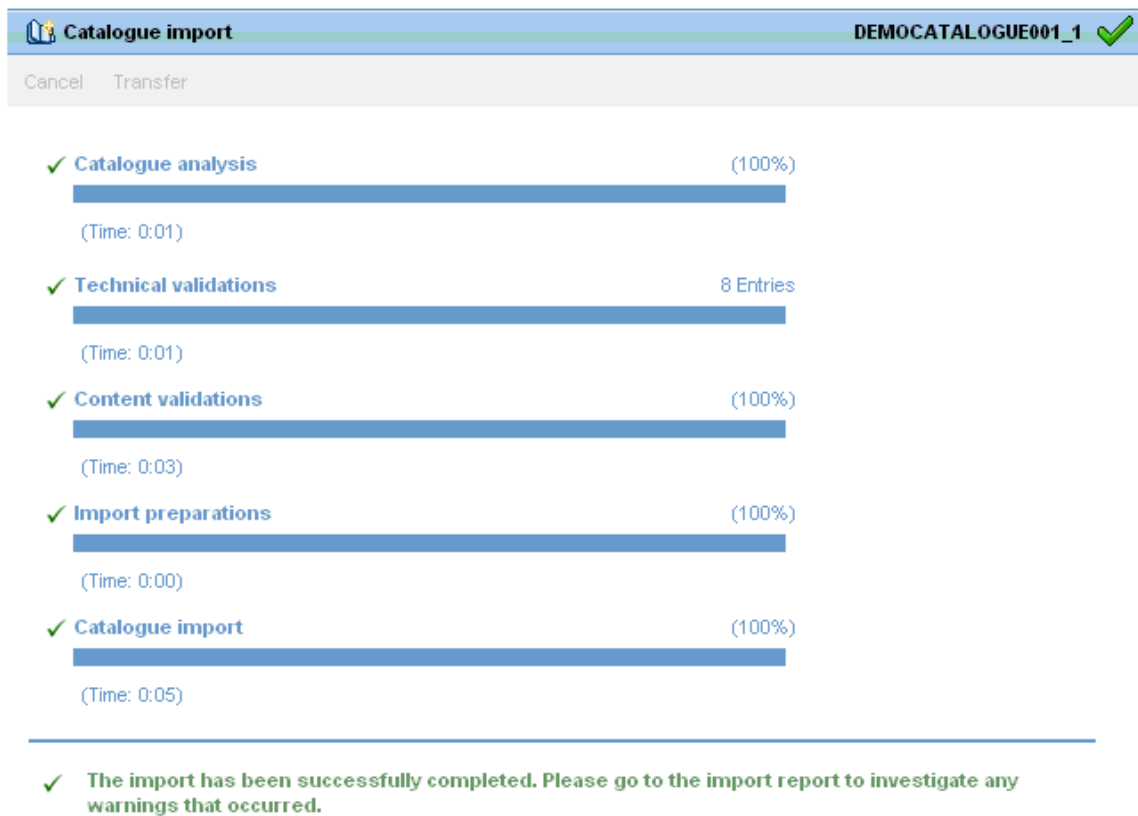
Note: Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the ProcServe Catalogue Builder and reload the file.

Note: The catalogue should be 'Not Found' which is correct as it's a new catalogue. If this is 'found' this means that the catalogue ID is already in use for another catalogue. In this situation you will need to create a new catalogue ID in the Catalogue Builder and reload.

7. Select Continue Analysis.

8. Once the import is successfully completed the confirmation screen is displayed:

Importing your Catalogue (BMECat File)



Catalogue import DEMOCATALOGUE001_1 ✓

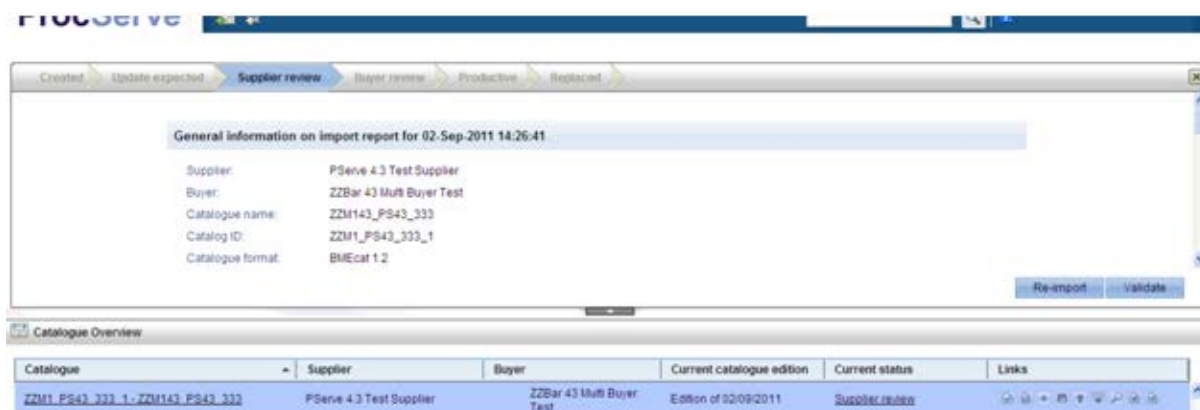
Cancel Transfer

- ✓ **Catalogue analysis** (100%)
(Time: 0:01)
- ✓ **Technical validations** 8 Entries
(Time: 0:01)
- ✓ **Content validations** (100%)
(Time: 0:03)
- ✓ **Import preparations** (100%)
(Time: 0:00)
- ✓ **Catalogue import** (100%)
(Time: 0:05)

✓ The import has been successfully completed. Please go to the import report to investigate any warnings that occurred.

9. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

10. The Import Report will now be displayed and the catalogue will now be in Supplier Review:



Created Update expected **Supplier review** Buyer review Productive Replaced

General information on import report for 02-Sep-2011 14:26:41

Supplier: PServe 4.3 Test Supplier
 Buyer: ZZBar 43 Multi Buyer Test
 Catalogue name: ZZM143_PS43_333
 Catalog ID: ZZM1_PS43_333_1
 Catalogue format: BMEcat 1.2

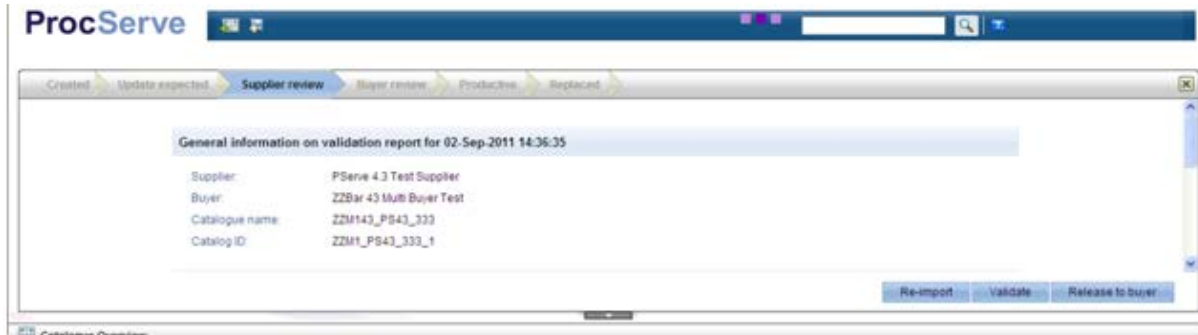
Re-import Validate

Catalogue Overview

Catalogue	Supplier	Buyer	Current catalogue edition	Current status	Links
ZZM1_PS43_333_1-ZZM143_PS43_333	PServe 4.3 Test Supplier	ZZBar 43 Multi Buyer Test	Edition of 02/09/2011	Supplier review	

11. Select Validate to run the validation report:

Importing your Catalogue (BMECat File)



12. If the Validation Report has run without errors, you can now create the additional files for secondary buying organisations, and set the catalogue to be multi-buyer.

13. If errors have been found in the validation report, you will need to address these before creating additional files.

4.4.3 Creating the Additional Files for Secondary Buying Organisations

Each secondary buying organisation that requires access to a multi buyer catalogue will need to load, separately, additional files. These should be created by the lead buying organisations using the ProcServe Catalogue Builder that the supplier completed to ensure consistent and complete data.

Note: In some instances the data can be taken from the ProcServe Catalogue System and, where applicable, this has been narrated in the manual.

The additional files which may be used include:

- Price File (Mandatory)
- Contract reference file (Optional)
- Delivery charge file (Optional)
- Icons file (Optional)

To create the files you need to copy data from the ProcServe Catalogue Builder into another spreadsheet

For the latest file templates please contact the ProcServe service desk.

The below tables highlight which columns data is copied from and pasted into.

Price File from the ProcServe Catalogue Builder

The below table shows you which columns in the ProcServe Catalogue Builder relate to the price file Template columns.

PCB column name	Price file template column name
Supplier Item ID	Item Number
Unit Price	Amount
Minimum Order Quantity	LowerBound
Price Effective Date	Price Effective Date
Price Expiry Date	Price Expiry Date

Price File from the ProcServe Catalogue System

The below table shows the data required to create the Price File. This can be generated from the Reports in Catalogue Explorer.

By changing the drop down option and selecting the reports highlighted in the table below you can run each report to generate the data for the Price File. Note: Only two reports are required, Price List Detailed and Order Information.

Note: You will have to select all the items within Catalogue Explorer for the Excel button to appear so you can run the download.

Report	Column within Report	Price file template column name
--------	----------------------	---------------------------------

Price List Detailed	Item number	Item Number
	Price Quantity	Amount
Order Information	Minimum Order Quantity	LowerBound
Price List Detailed	Valid From	Price Effective Date
	Valid To	Price Expiry Date

Contract Reference File from the ProcServe Catalogue Builder

If you use the contract reference field in the ProcServe Catalogue Builder you will need to create a contract reference file.

The below table shows you which columns in the ProcServe Catalogue Builder relate to the contract reference File columns.

You need to copy the contract reference data from the original ProcServe Catalogue Builder into the contract reference template file. **Note:** You cannot retrieve this data from the Catalogue System.

PCB column name	Contract ref file template column name
Supplier Item ID	Item Number
Contract Reference	Contract Reference

Delivery Charge File from the ProcServe Catalogue Builder

Note: If the main catalogue has 50 items, the Delivery Charge File will also need to have 50 lines with the same Delivery Charge Rule. This is to ensure the Delivery Rule is visible to the user for all items in the catalogue.

PCB Source	Delivery Charge file template column name
Supplier Item ID	Item Number
Header on the ProcServe Catalogue Builder	DeliveryChargeRule

Delivery Charge File from the ProcServe Catalogue System

Note: If the main catalogue has 50 items, the Delivery Charge File will also need to have 50 lines with the same Delivery Charge Rule. This is to ensure the Delivery Rule is visible to the user for all items in the catalogue.

Source	Delivery Charge file template column name
Item Number from the Price List Detailed report	Item Number

From an individual item within the catalogue:
 Navigate to Catalogue Explorer > Select the
 catalogue > view any item > scroll down and
 you can view the DELIVERYCHARGERULE

DeliveryChargeRule

Icons File from the ProcServe Catalogue Builder

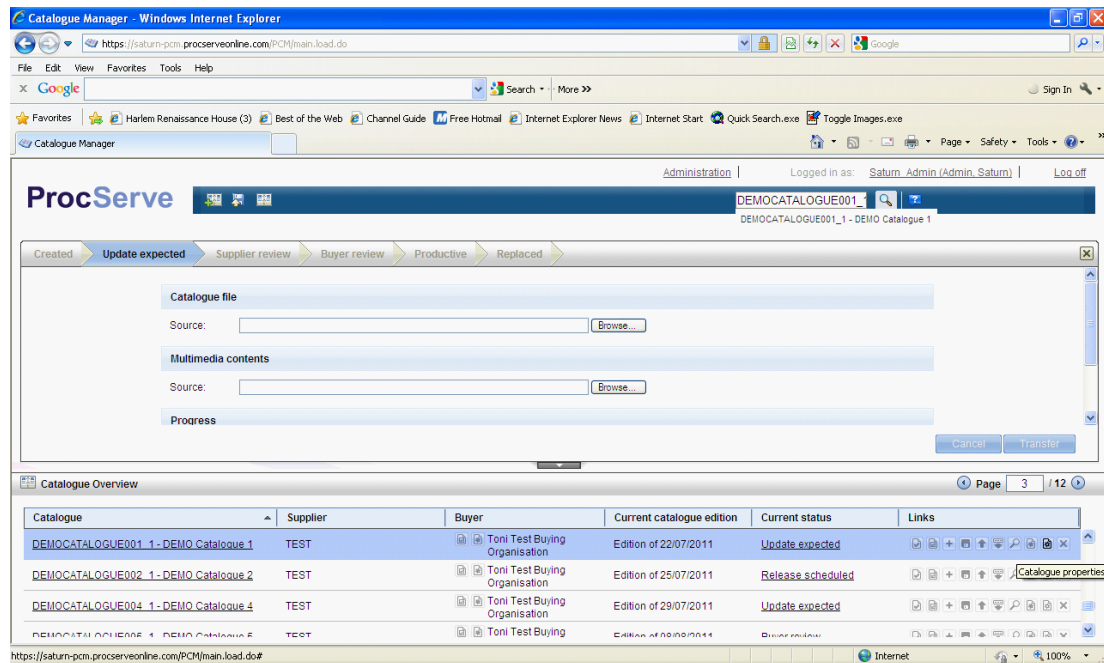
The Icon file only needs completing and loading if the catalogue is utilising Icons.

PCB Source	Icon file template column name
Supplier Item ID	Item Number
Central-Hub-Item	Central-Hub-Item
Collaborative-Content-Item	Collaborative-Content-Item
Core-Item	Core-Item
Environment-Friendly-Item	Environment-Friendly-Item
Hazardous-Item	Hazardous-Item

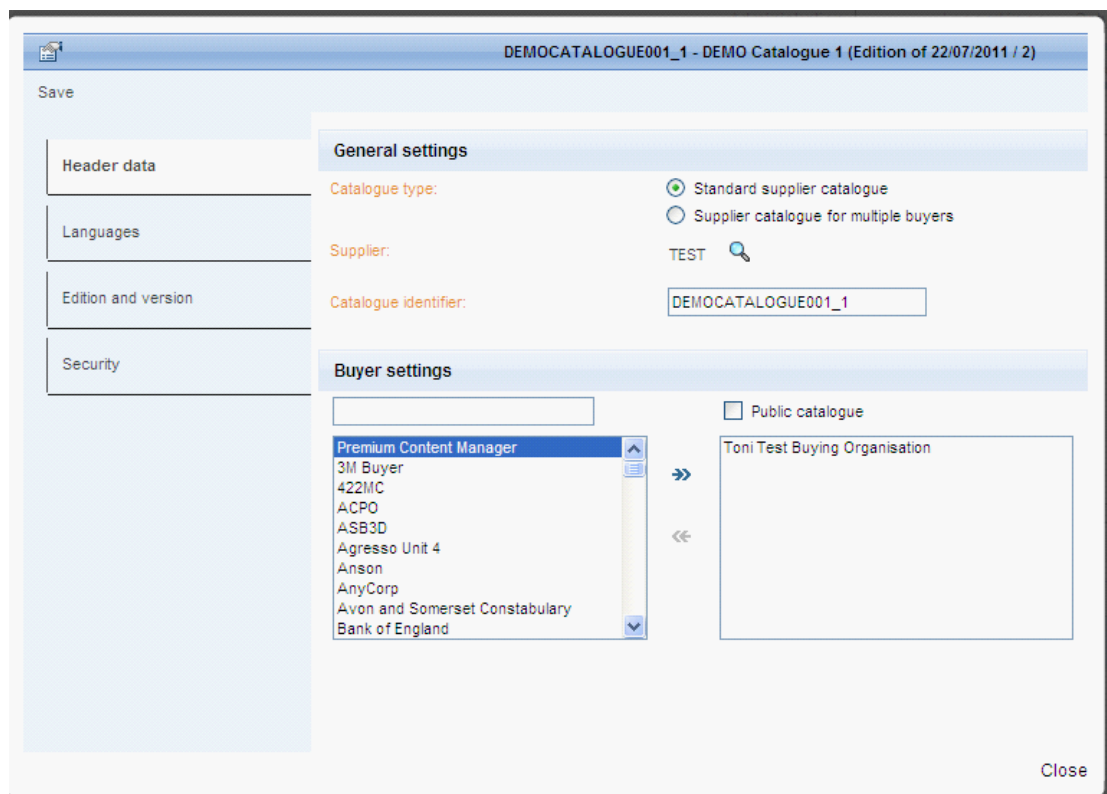
4.4.4 Setting the Catalogue to Multi-Buyer

The catalogue will need to be configured as multi-buyer so it can be shared with other buying organisations.

1. Select Catalogue Properties from the Links menu.



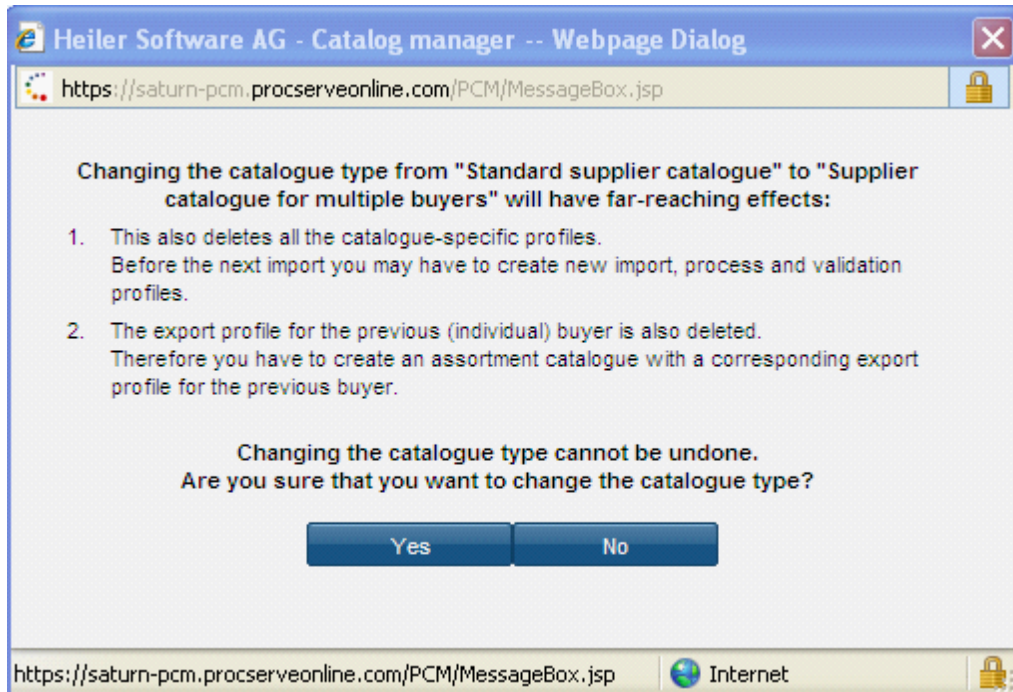
2. Open the header data tab from within the popup:



3. Select the 'supplier catalogue for multiple buyers' option as indicated in the above image:

Read the warnings and make sure you are working on the correct catalogue.

4. Click the **yes** button if you wish to convert the catalogue to multi-buyer or **no** to return to the header data tab:



5. Save changes

Click the save icon in the top left of the pop-up window to save the catalogue as multi-buyer

Tip: Changes will not be made to the system until you have saved the new header details.

6. The catalogue is now a multi-buyer catalogue:

7. The status of the catalogue will now revert to Created or Update Expected.

Catalogue Overview						Page 3 / 12
Catalogue	Supplier	Buyer	Current catalogue edition	Current status	Links	
DEMOCATALOGUE001_1 - DEMO Catalogue 1	TEST	<Multiple buyers>	Edition of 22/07/2011	Update expected		

4.4.5 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling)

Note: The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.

Note: Workflow changes will be effective on Change of the Catalogue Status.

1. Select the catalogue workflow option from the Links Menu:



2. Set up the email settings as required. Search for the relevant organisation on the top right:

Workflow

E-mail settings Automation settings Release settings

Update expected

Import blocked

Supplier review

Buyer review

Release scheduled

Productive

Replaced

Search
Organization: TEST

Search results

Select

Selection

System, Administrator (Premium Content Manager)

Griffiths, Toni (TEST)

Deselect

Save

3. Click on the relevant users and click on the select button (repeat as necessary):

Configuring Catalogue Workflow

The screenshot displays the 'Workflow' configuration page. On the left, a vertical list of workflow stages includes 'Update expected', 'Import blocked', 'Supplier review', 'Buyer review', 'Release scheduled', 'Productive', and 'Replaced'. The 'Release settings' tab is active. The main area shows a search for 'Organization: TEST'. The 'Search results' list contains 'System, Administrator (Premium Content Manager)'. Below this is a 'Select' button. The 'Selection' section shows 'Griffiths, Toni (TEST)' with a 'Deselect' button highlighted by a mouse cursor. A 'Save' button is located at the bottom right.

4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):

This screenshot is identical to the one above, showing the 'Workflow' configuration page. It highlights the 'Selection' step where 'Griffiths, Toni (TEST)' is listed, and the 'Deselect' button is being clicked by a mouse cursor. The 'Save' button is visible at the bottom right.

You need to set users for all 7 sections:

- o Update Expected (Supplier Super User)
- o Import Blocked (Supplier Super User)
- o Supplier Review (Supplier Super User)
- o Buyer Review (Buyer Super User)
- o Release Scheduled (Buyer Super User)
- o Productive (Buyer Super User)
- o Replaced (Buyer Super User)

5. Click on Automation Settings and ensure that the Automation settings are set as required:

Workflow		
E-mail settings	Automation settings	Release settings
	Automated import:	<input checked="" type="checkbox"/>
	Automated validation supplier:	<input type="checkbox"/>
	Automated validation buyer:	<input type="checkbox"/>
	Automated release:	<input type="checkbox"/>
	Automated update expected:	<input checked="" type="checkbox"/>

Save

Note: Suggested setting for a standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

Configuring Catalogue Workflow

Workflow

E-mail settings Automation settings Release settings

Release mode:

Scheduling:

Time (e.g. 23:00):

Create search database:

Save

7. Click on Save on the bottom right of the pop-up window.
8. Click on close or click outside of the catalogue window.

4.4.6 Validating your catalogue

The catalogue will automatically inherit the standard validation rules that have been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

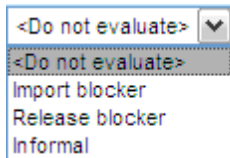
Note: Any changes to the validation profile will be effective immediately

1. Amending the validation profile from your standard profile

Select the validation profile icon for your catalogue from the Links Menu.



To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon



Change the required details and click on save and close the pop-up.

Tip: Ensure you give the rule a meaningful name so that others can recognise what that rule checks for

Tip: Do not amend rules as this amends the rule for all catalogues and organisations on the system

4.4.7 Adding Secondary Buying Organisations to Multi-Buyer Catalogue

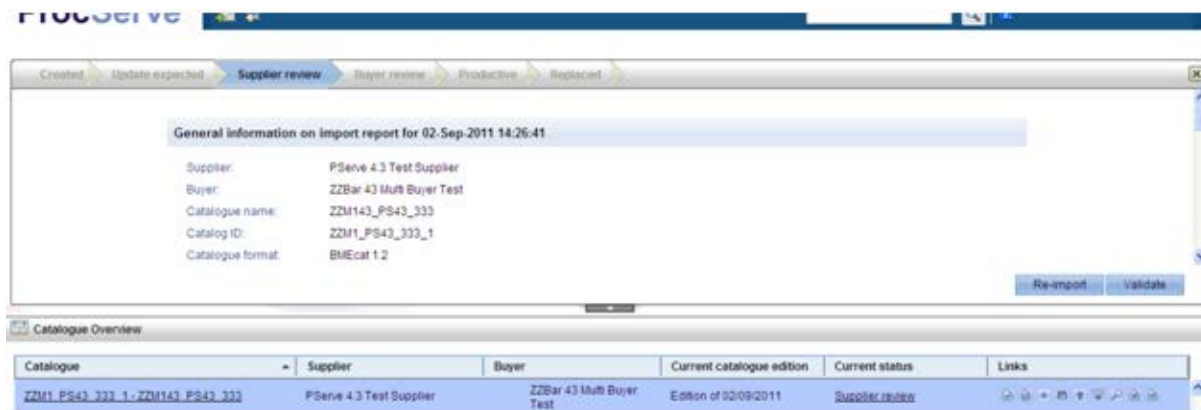
You will need to email/call the Service Desk to allow the secondary buying organisations access to the catalogue. They will add these buyers to the catalogue.

Within this email/call please include the following information:

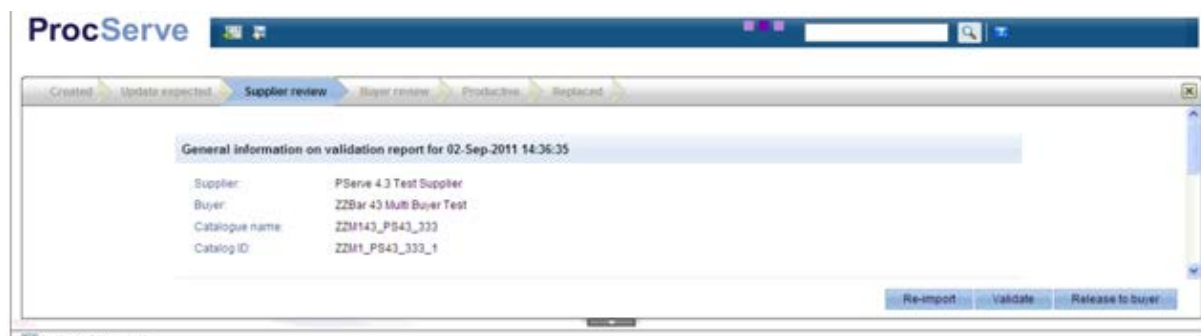
- **Your organisation name**
- **The catalogue name and ID**
- **The names of the other buying organisations**

Once the additional organisations have been added select the catalogue by clicking on it and in the top window click on the "Continue Without Import" button.

You will now need to Validate the catalogue at Supplier Review status.



You can now take the catalogue through Supplier Review and release to buyer



Price File Uploads

You should now send the Price, Contract Reference, Icon and Delivery Rule files to the secondary buying organisations who should then load, validate and confirm when this has been completed.

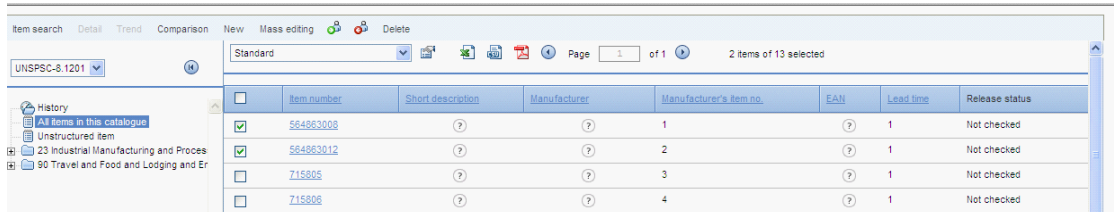
You should not approve or release the catalogue until all organisations have completed loading their files.

4.4.8 Approving your Catalogue

Once confirmations of uploads or Price, Contract Icon and Delivery Files has been received from secondary Buying Organisations you will be able to approve your catalogue.

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from the Links Menu.



	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

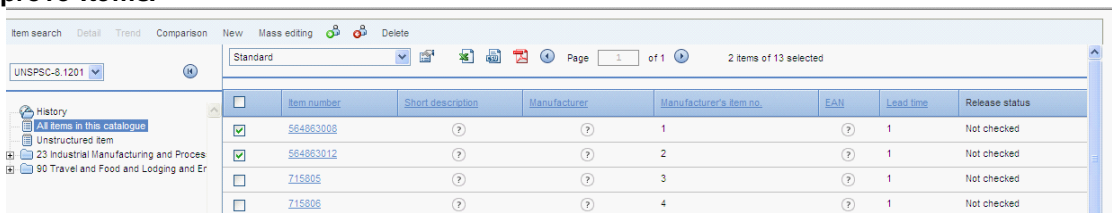
2. You can now approve and/or reject the items loaded:

Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon from the menu at the top of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

When you are sure that an item is correct, you can check the relevant items and click the Approve icon on the menu at the top of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

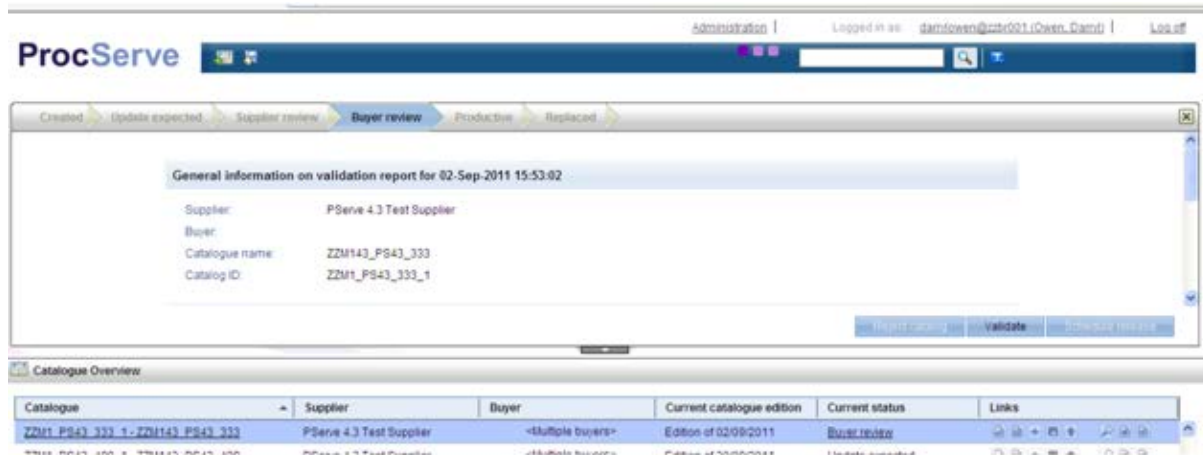
Note: If changes are required then it is recommended to make the changes in the ProcServe Catalogue Builder and re-import the file. This will ensure that your copy of the Catalogue Builder reflects the content on the system.

Note: Any new file imported will over write the old data where the header data is the same.

4.4.9 Buyer Review and Exporting your Multi-Buyer Catalogue

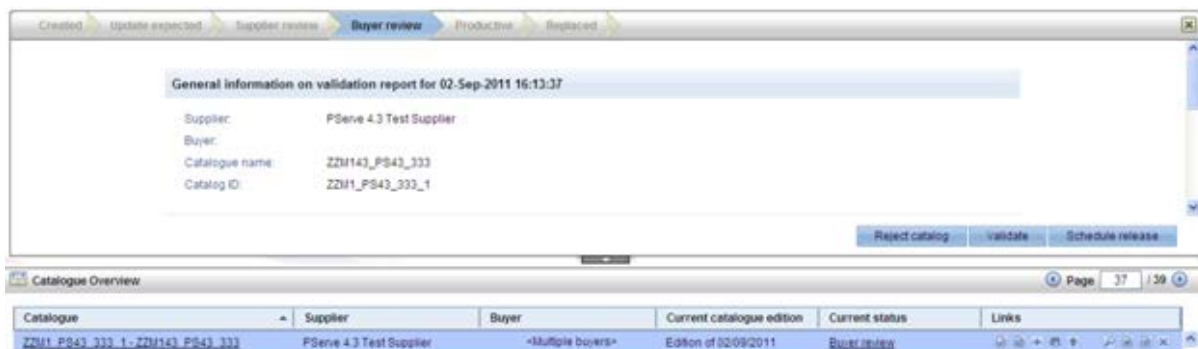
Once you have completed the above steps you now will be able to release your catalogue.

You can now validate and release your catalogue. You can complete this by searching for your Catalogue and select Validate.

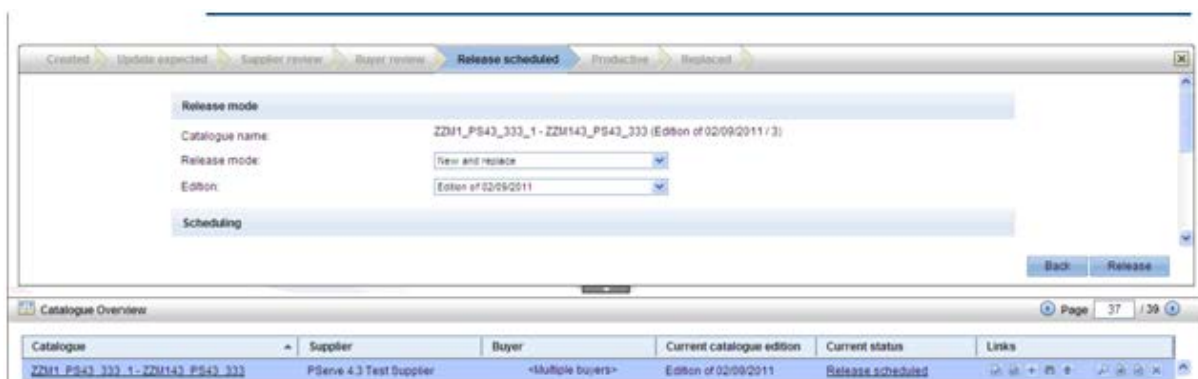


Once the Validation has run successfully, you can now Schedule Release.

If there are any problems returned in the Validation report, we recommend that you amend these in the Catalogue Builder and re-import.



The status will now show as Release Scheduled. Check that the release settings are correct and select Release.



Your catalogue should now export automatically by following the Export Profile you created.

4.4.10 Secondary Buying Organisation - Loading the Additional Files

As a secondary buying organisation you will need to upload the additional files to be able to see and trade using the multi-buyer Catalogue.

1. Uploading the Additional Files:

The price file and, if required, the contract reference, delivery charge and icon files must be uploaded by each buying organisation before exporting the catalogue to the Marketplace.

There are two options:

Option 1. Where you are operating on behalf of other buying organisations:

You should access each account as a buyer contract manager for each organisation and upload as directed below.

Option 2. If you are not operating on behalf of other buying organisations:

You should send the relevant files to all of your buying organisations and direct them to upload as below.

2. Upload the price file in Catalogue Manager:

Navigate to the catalogue by searching for the catalogue name.

Note: Loading Price Files with Price Effective Date and Price Expiry Date:

When loading Price files which have a Price Effective and Price Expiry Date care should be taken not to load these files with a Price Effective Date which is in the past. The main catalogue will load as normal and will not give an error.

In the Price File example below (where it is being loaded on 08//02/2011):

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	01/11/2010	30/07/2011	✗
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

Item ID1001	Future date. Item will be available to buy from this date.
Item ID1002	Current date. Will be available immediately
Item ID1003	Past date. May give an error when loading Price File.
Item ID1004	Current date. Will be available immediately

Before loading the Price File, the Price Effective Date should be changed to the current date or the date when the Price File will be loaded. It is easier to do this if the Price File is sorted in Ascending order on the Price Effective Date. Any dates in the past will be shown near the top and can be amended quickly.

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	08/02/2011	30/07/2011	✓
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

3. Select the Catalogue from the list of results and select the Data Upload Icon from the Links Menu.

5. The Data Upload page is displayed.

6. Leave the Excel option checked.

7. Select the relevant Schema/s:

Price List	If you are uploading a price list select Price List (Item Price) from the Schema list.
Contract Reference	If you are uploading a contract reference list select Contract Reference (Buyer Extension) from the Schema list.
Delivery Charge	If you are uploading a delivery charge file select Delivery Charge (Buyer-Specific Extensions) from the Schema list.
Icons File	If you are uploading a icons file select Icons (Buyer-Specific Extensions) from the Schema list.

8. Click the Browse button:

A dialogue is displayed. Locate and select the relevant file and click the upload button.

9. Repeat this process until all required files have been uploaded.

You can do this by selecting Data upload from the top left of the pop-up

10. Exit out of the Data Upload Screen by selecting Close at the bottom of the window or clicking your mouse on the dark area of the page.

11. You should now run a validation on the catalogue by selecting Validate.

Once the Price and Contract Reference files have been loaded and validated the secondary Buying Organisations should notify the lead buying organisation so they can schedule the release of the catalogue.

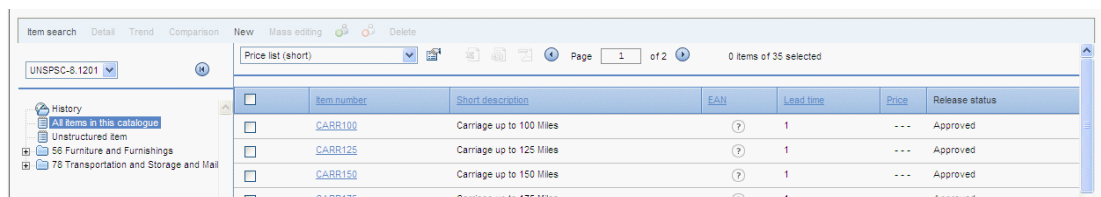
4.4.11 Changing the buyer in List Properties

Changing the buyer in List Properties in order to download the correct price file

1. Select the catalogue

2. Click on Catalogue Explorer from the Links menu

3. Change the drop down from Standard to Price list (Short) and click on the icon next to this drop down



The screenshot shows the ProcServe interface. At the top, there is a navigation bar with tabs: Item search, Detail, Trend, Comparison, New, Mass editing, and Delete. Below this, a search bar contains 'UNSPSC-8.1201'. To the right of the search bar, a dropdown menu is set to 'Price list (short)'. Below the search bar, there is a list of items with columns: Item number, Short description, Edit, Lead time, Price, and Release status. The items listed are CARR100, CARR125, CARR150, and CARR175, all with a lead time of 1 and a release status of Approved.

Item number	Short description	Edit	Lead time	Price	Release status
CARR100	Carriage up to 100 Miles	?	1	---	Approved
CARR125	Carriage up to 125 Miles	?	1	---	Approved
CARR150	Carriage up to 150 Miles	?	1	---	Approved
CARR175	Carriage up to 175 Miles	?	1	---	Approved

4. A pop up window will appear in which you can make further settings for the items' list presentation

5. Click on the Buyer Drop Down box to change the buyer.

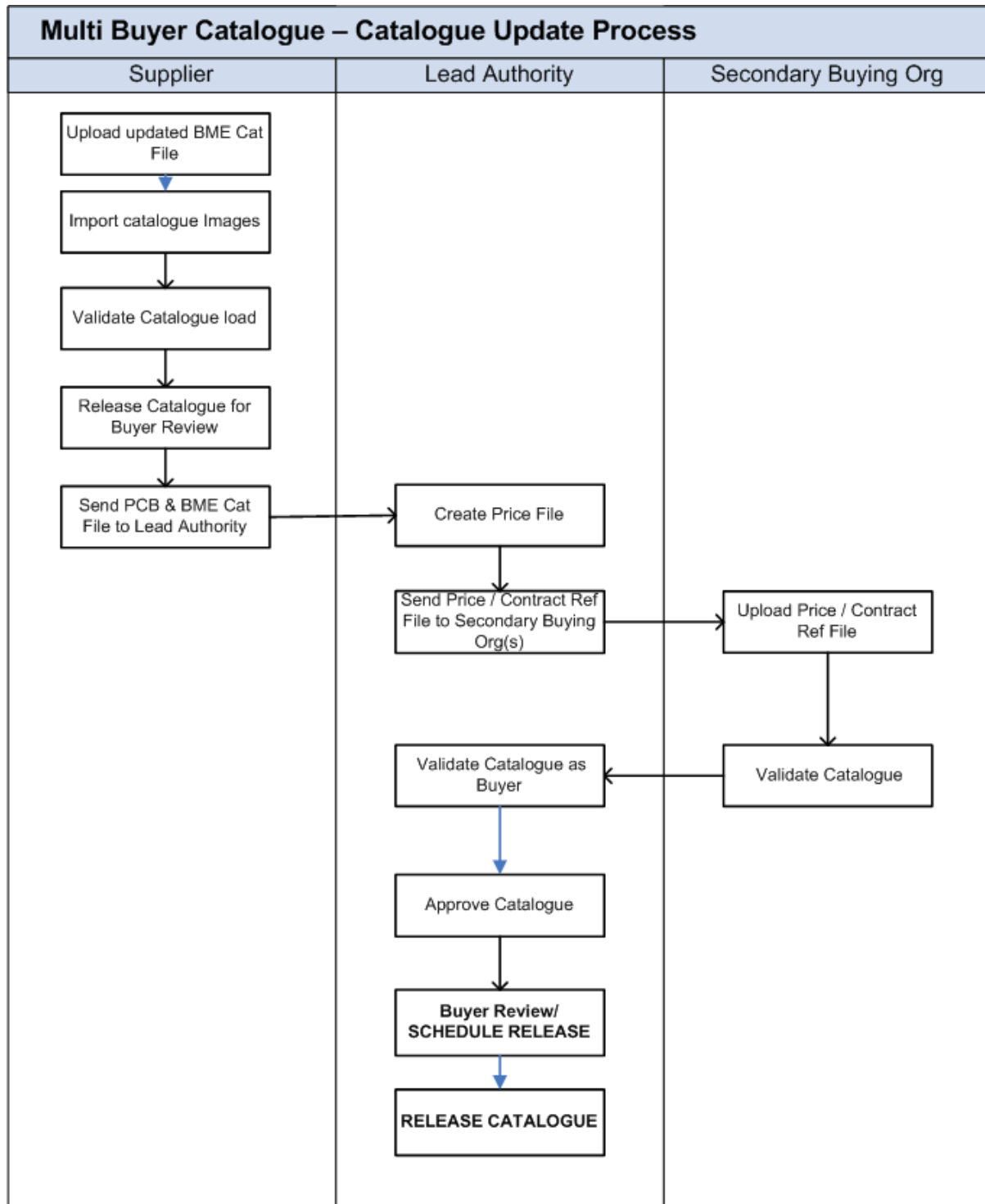
6. Click ok to view the other buyers item prices and to download the lead buyers price list.

4.5 Multi-Buyer Catalogue - Catalogue Update Process

4.5.1 Overview

Overview

This section describes the process of updating a Multi-Buyer catalogue.

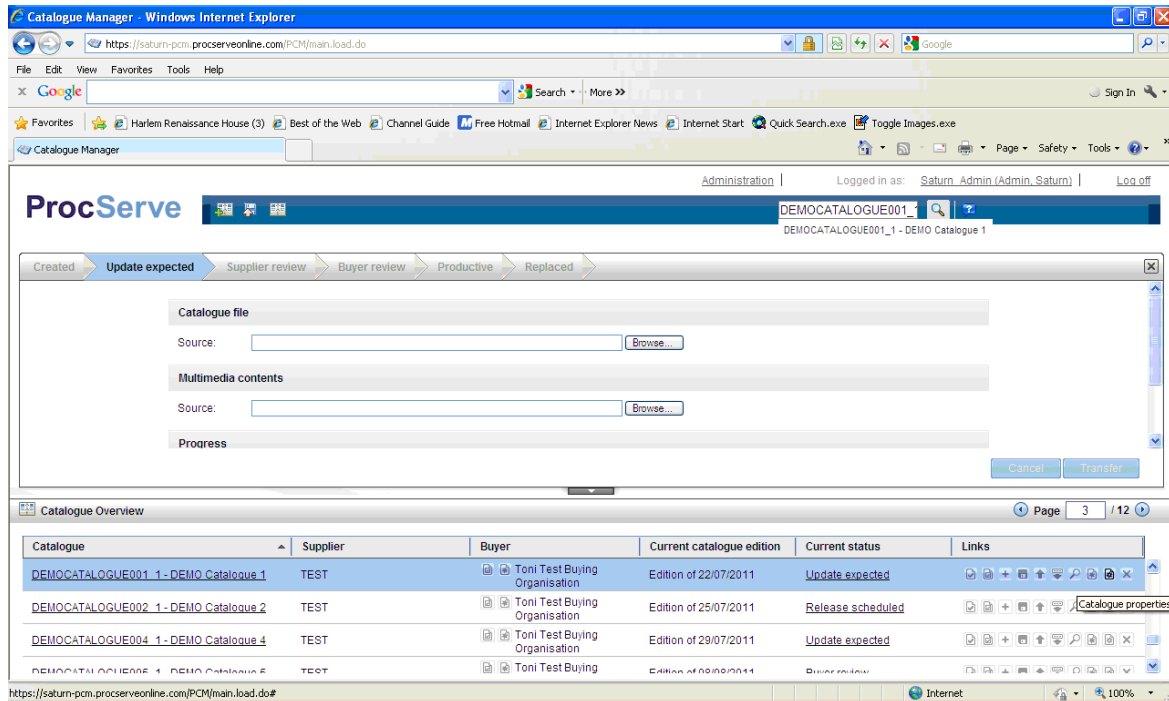


4.5.2 Importing the Updated Catalogue

The following steps should be completed by the supplier:

1. Navigate Admin Menu >> Catalogue Management.

2. The Catalogue Manager is displayed. Select the Catalogue by clicking on either the name or the status of the catalogue. The actions that can be completed at this stage will be available.

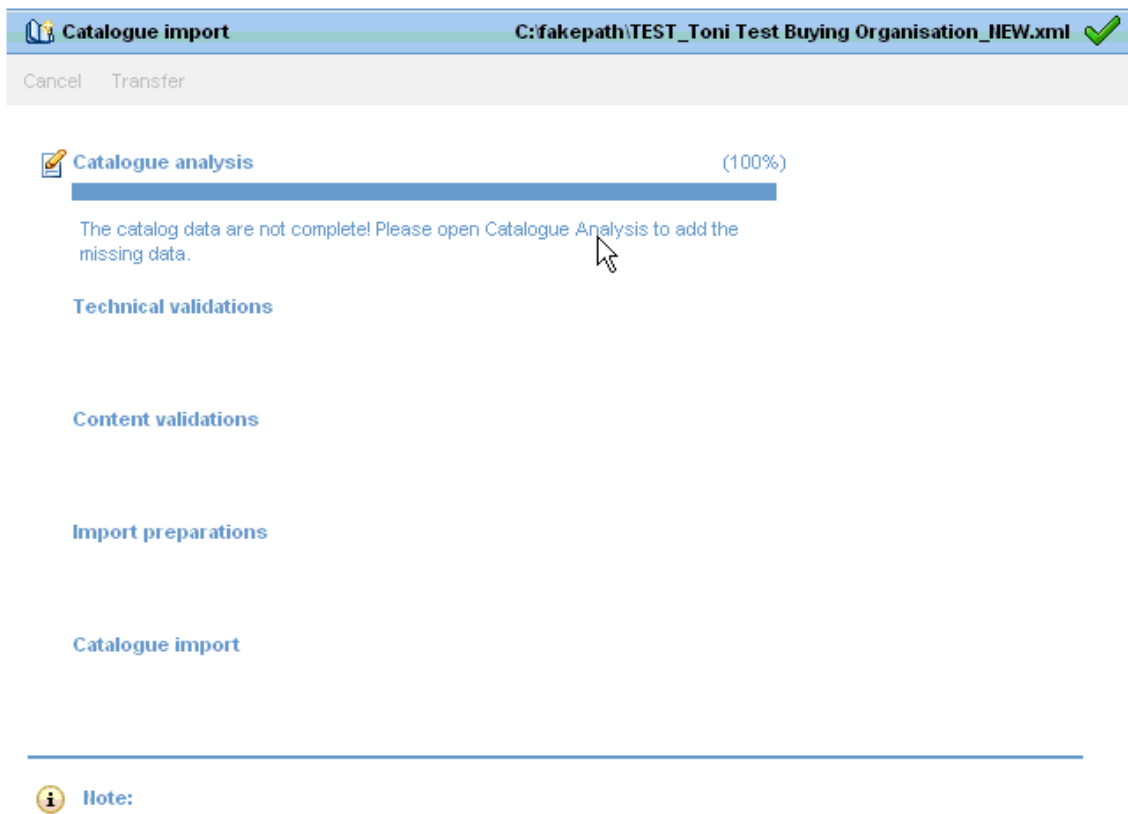


3. Import BMECat File. Click the browse button on the catalogue file path:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

4. Click the Transfer button on the right.

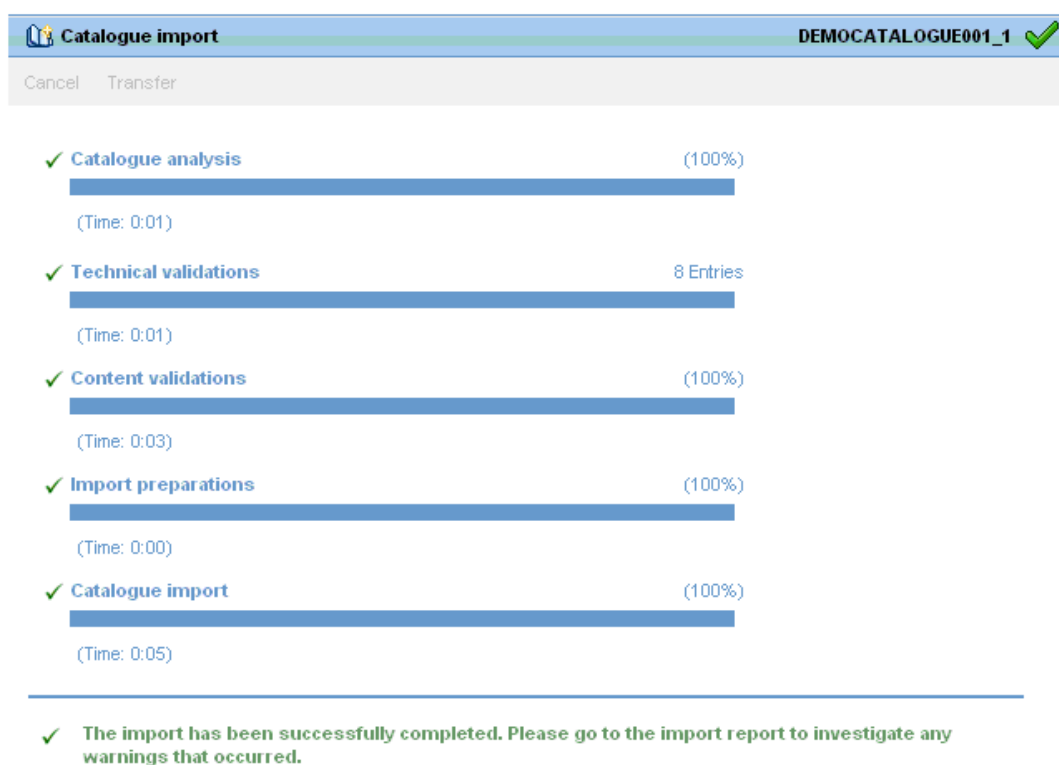
Importing the Updated Catalogue



5. The Summary page is displayed:

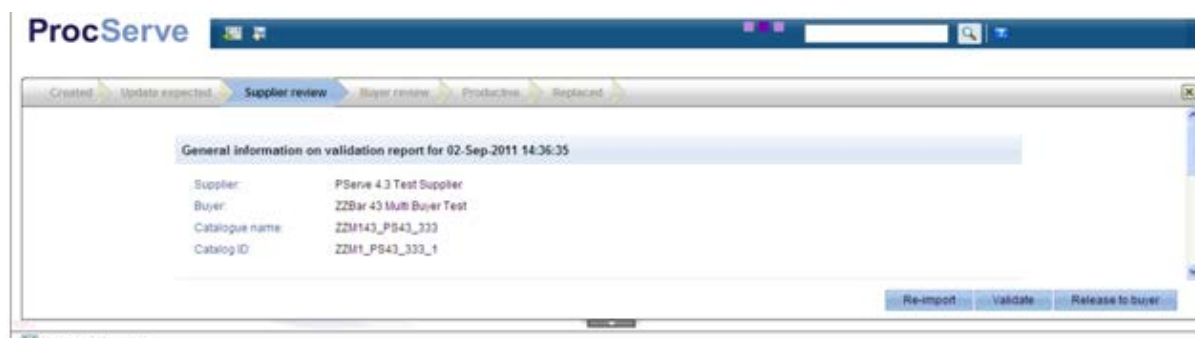
6. Once the import has successfully completed the confirmation screen is displayed:

Importing the Updated Catalogue



7. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

Note: Depending on the workflow configured for this catalogue, the catalogue will now go to Supplier Review. An email will be sent to the nominated supplier user to prompt them to complete this.



8. Buyer Review: Once a supplier has performed the upload they will release the catalogue to Buyer Review. The ProcServe Catalogue Manager System will automatically email the users listed in the Buyer Review section of this catalogues workflow so the next stage of the process can be completed.

9. Once the Buyer has Validated the catalogue, they should send the price and other files to the secondary buying organisations to load.

Do not approve or release the catalogue until all secondary buying organisations have completed uploading their files.

4.5.3 Creating a Price File and Contract Ref File

Each secondary buying organisation that requires access to a multi buyer catalogue will need to load price and contract reference files. The Price File should be created by the lead buying organisation by either downloading from the ProcServe Catalogue Manager or by using the ProcServe Catalogue Builder that the supplier completed.

Note: Suppliers that use Price Breaks in their catalogue will need to send their catalogue Builder to the lead organisation to allow them to create the price files incorporating Price Breaks. You cannot download Price Break information from the ProcServe Catalogue Manager.

To create the files you need to copy data from the ProcServe Catalogue Builder into another spreadsheet - the price / contract reference template files. This will ensure you have captured all the relevant data including any price breaks.

For the latest price file and contract reference templates please contact the ProcServe service desk.

The below tables highlight which columns data is copied from and pasted into.

Creating a Price File from the ProcServe Catalogue System

Price File Templates are available from the ProcServe Service Desk.

The below table shows how you can create a Price File from the available reports in Catalogue Explorer. By changing the drop down option and selecting the reports highlighted below you can run each report and create the Price File.

Please note you will have to select all items to enable the Excel button in order to generate the report.

Report	Column within Report	Price file template column name
Price List Detailed	Item number	Item Number
Price List Detailed	Price Quantity	Amount
Order Information	Minimum Order Quantity	LowerBound
Price List Detailed	Valid From	Price Effective Date
Price List Detailed	Valid To	Price Expiry Date

Creating a Price File from the ProcServe Catalogue Builder

To create the files copy data from the ProcServe Catalogue Builder into the price / contract reference template files. This will ensure you have captured all the relevant data including any price breaks.

The below table shows you which columns in the ProcServe Catalogue Builder relate to the price file Template columns.

PCB column name	Price file template column name
Supplier Item ID	Item Number

Unit Price	Amount
Minimum Order Quantity	LowerBound
Price Effective Date	Price Effective Date
Price Expiry Date	Price Expiry Date

Creating a Contract Reference File from the ProcServe Catalogue Builder

Contract Reference Templates are available from the ProcServe Service Desk

If the Contract reference is used in the ProcServe Catalogue Builder the Buying Organisation can create a contract reference file

The below table shows you which columns in the ProcServe Catalogue Builder relate to the contract reference File columns.

PCB column name	Contract ref file template column name
Supplier Item ID	Item Number
Contract Reference	Contract Reference

4.5.4 Secondary Buying Organisation - Loading the Price and Contract Files

The secondary buying organisation will need to upload a price file and contract reference file to be to buy from the multi-buyer catalogue

1. Uploading the Additional Files:

The price file and, if required, the contract reference, delivery charge and icon files must be uploaded and validated by each buying organisation before exporting the catalogue to the Marketplace.

There are two options:

Option 1. Where you are operating on behalf of other buying organisations:

You should log in as a buyer super user for each organisation and upload as directed below.

Option 2. If you are not operating on behalf of other buying organisations:

You should notify all of your buying organisations and direct them to upload as below.

2. Upload the price file in Catalogue Manager. Navigate to the catalogue by searching for the catalogue name.

Note: Loading Price Files with Price Effective Date and Price Expiry Date

When loading Price files which have a Price Effective and Price Expiry Date care should be taken not to load these files with a Price Effective Date which is in the past. The main catalogue will load as normal and will not give an error.

In the Price File example below (where it is being loaded on 08//02/2011):

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	01/11/2010	30/07/2011	✗
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

Item ID1001	Future date. Item will be available to buy from this date.
Item ID1002	Current date. Will be available immediately
Item ID1003	Past date. May give an error when loading Price File.
Item ID1004	Current date. Will be available immediately

Before loading the Price File, the Price Effective Date should be changed to the current date or the date when the Price File will be loaded. It is easier to do this if the Price File is sorted in Ascending order on the Price Effective Date. Any dates in the past will be shown near the top and can be amended quickly.

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	08/02/2011	30/07/2011	✓
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

3. Select the Catalogue from the list of results and select the Data Upload Icon from Links.

5. The Data Upload page is displayed.

6. Leave the Excel option checked.

7. Select the Schema:

Price List	If you are uploading a price list select Price List (Item Price) from the Schema list.
Contract Reference	If you are uploading a contract reference list select Contract Reference (Buyer Extension) from the Schema list.
Delivery Charge	If you are uploading a delivery charge file select Delivery Charge (Buyer-Specific Extensions) from the Schema list.
Icons File	If you are uploading a icons file select Icons (Buyer-Specific Extensions) from the Schema list.

8. Click the Browse button:

A dialogue is displayed. Locate and select the relevant file and click the upload button.

9. The file is uploaded

When the upload is complete a message containing an upload summary is displayed. Repeat this process until all required files have been uploaded. You can do this by selecting Data upload from the top left of the pop-up.

10. Exit out of the Data Upload Screen by selecting Close at the bottom of the window or clicking your mouse on the dark area of the page.

11. You should now run a validation on the catalogue by selecting Validate.

Once the Price and Contract Reference files have been loaded and validated the secondary Buying Organisations should notify the lead buying organisation so they can schedule the release of the catalogue.

4.5.5 Lead Organisation - Approving your Catalogue

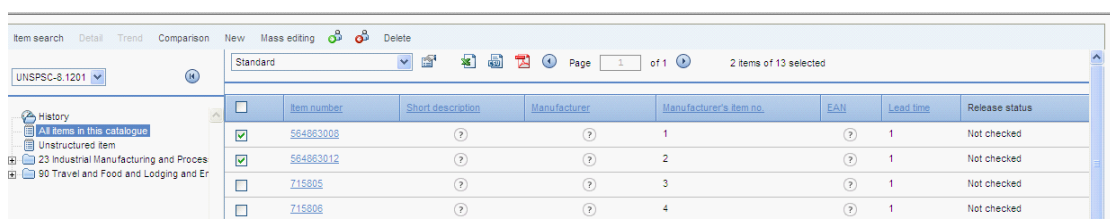
The lead buying organisation will perform the task of approving the catalogue.

Buyer Review: Approving the Catalogue

The buyer review is now required. The buyer contract manager will need to check and then approve the items / catalogue.

To approve the items in the catalogue the buying organisation will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from the Links Menu.



	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

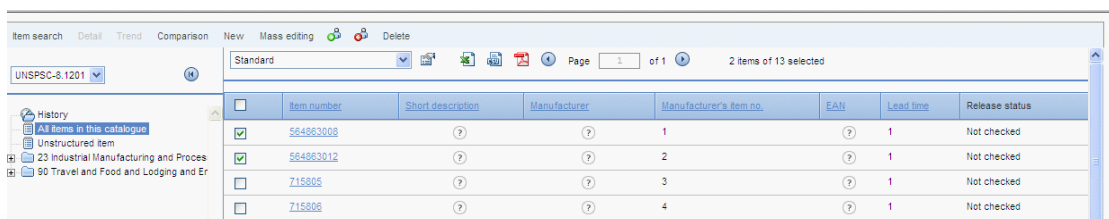
2. Approve and/or reject the items loaded:

Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon at the top of the page. The item is now marked for rejection.

Note: If any items are rejected, the Supplier should be advised accordingly.

Approve Items:



	Item number	Short description	Manufacturer	Manufacturer's item no.	EAN	Lead time	Release status
<input checked="" type="checkbox"/>	564863008	?	?	1	?	1	Not checked
<input checked="" type="checkbox"/>	564863012	?	?	2	?	1	Not checked
<input type="checkbox"/>	715805	?	?	3	?	1	Not checked
<input type="checkbox"/>	715806	?	?	4	?	1	Not checked

Items that need to be approved should be selected and approved using the Approve icon at the top of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

4.5.6 Exporting your Multi-Buyer Catalogue

You can now validate and release your catalogue. You can complete this by searching for your Catalogue and select Schedule Release in the Catalogue Overview window.

Select Validate

The screenshot shows the ProcServe interface at the 'Buyer review' stage. The top navigation bar includes 'Created', 'Update expected', 'Supplier review', 'Buyer review' (active), 'Productive', and 'Replaced'. The main content area displays 'General information on validation report for 02-Sep-2011 15:53:02' with the following details:

- Supplier: PServe 4.3 Test Supplier
- Buyer: ZZM143_PS43_333
- Catalogue name: ZZM143_PS43_333
- Catalog ID: ZZM1_P843_333_1

Buttons for 'Validate' and 'Schedule release' are visible at the bottom right. Below this is the 'Catalogue Overview' table:

Catalogue	Supplier	Buyer	Current catalogue edition	Current status	Links
ZZM1_P843_333_1-ZZM143_PS43_333	PServe 4.3 Test Supplier	<Multiple buyers>	Edition of 02/09/2011	Buyer review	[Icons]

Once the Validation has run successfully, you can now Schedule Release.

This screenshot shows the ProcServe interface at the 'Buyer review' stage. The top navigation bar includes 'Created', 'Update expected', 'Supplier review', 'Buyer review' (active), 'Productive', and 'Replaced'. The main content area displays 'General information on validation report for 08-Aug-2011 17:42:29' with the following details:

- Supplier: TEST
- Buyer: Toni Test Buying Organisation
- Catalogue name: DEMO Catalogue 5
- Catalog ID: DEMOCATALOGUE005_1

Buttons for 'Reject catalog', 'Validate', and 'Schedule release' are visible at the bottom right.

The status will now show as Release Scheduled. Check that the release settings are correct and select Release.

The screenshot shows the ProcServe interface at the 'Release scheduled' stage. The top navigation bar includes 'Created', 'Update expected', 'Supplier review', 'Buyer review', 'Release scheduled' (active), 'Productive', and 'Replaced'. The main content area displays 'Release mode' with the following details:

- Catalogue name: ZZM1_P843_333_1-ZZM143_PS43_333 (Edition of 02/09/2011 / 3)
- Release mode: New and replace
- Edition: Edition of 02/09/2011

Buttons for 'Back' and 'Release' are visible at the bottom right. Below this is the 'Catalogue Overview' table:

Catalogue	Supplier	Buyer	Current catalogue edition	Current status	Links
ZZM1_P843_333_1-ZZM143_PS43_333	PServe 4.3 Test Supplier	<Multiple buyers>	Edition of 02/09/2011	Release scheduled	[Icons]

Your catalogue will now export and change to the status Update Expected.

5

Managing Classification Views

5 Managing Classification Views

5.1 Managing Classification Views Overview

This section describes how to create and manage classification views.

Note: If your buying organisation is using Zanzibar for shopping and transactions then Classification views need creating in the marketplace and in Zanzibar.

Classification views are created to allow a buyer to see only selected UNSPSC classifications and or supplier catalogues.

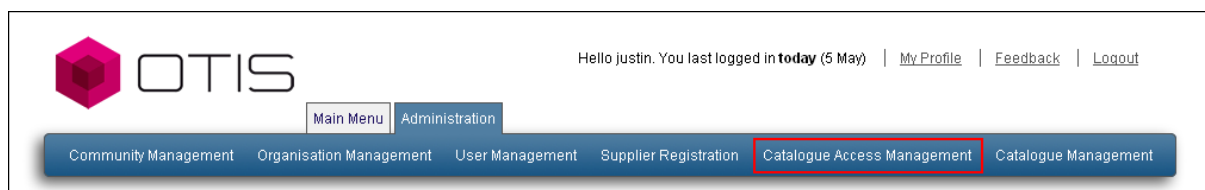
5.2 Adding a new Classification View

Overview

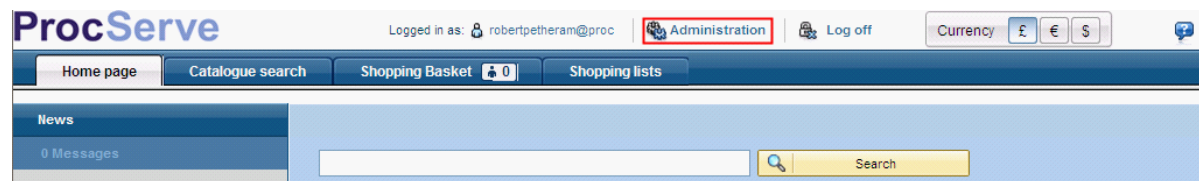
This section describes how to create and manage classification views. In the marketplace you administer the catalogue content of the classification view where as in Zanzibar you administer what classification views an organisation and its user has access too.

Adding a new Classification View to the marketplace

1. Login to Zanzibar
2. Click on 'Administration'
3. Click on 'Catalogue Access Management'

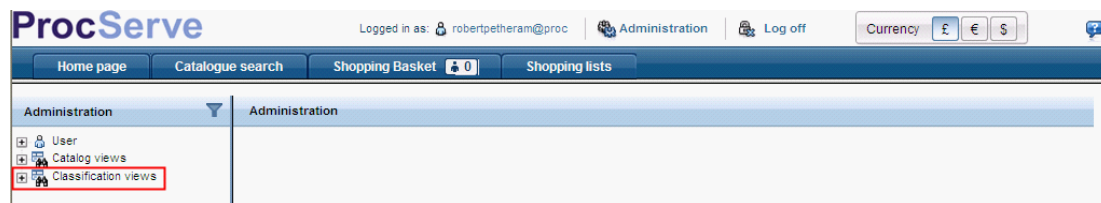


A new window will open and the Catalogue Home page is displayed:



4. Open Administration Module

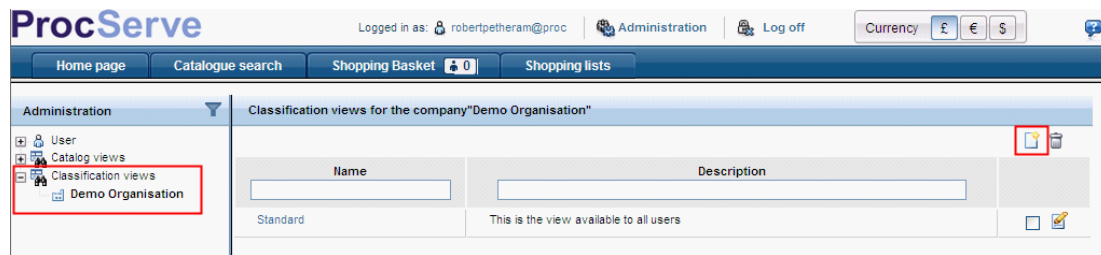
Click the Administration link as indicated in the above image. The Administration module is displayed:



Note: You need special permissions to view the Administration module and some of its contents. If you cannot access the administration module and need to work with Classification views please contact your service support team.

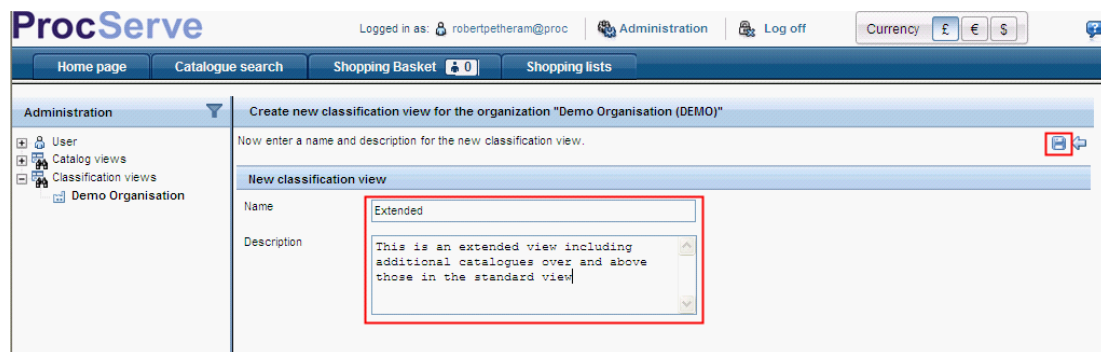
5. Navigate Classification Views >> Your Organisation

To create a new classification view expand the classification views option in the left hand pane. Then select the organisation name, this will open a list of the existing views and the option on the right hand side of the screen to create a new view which should be selected.

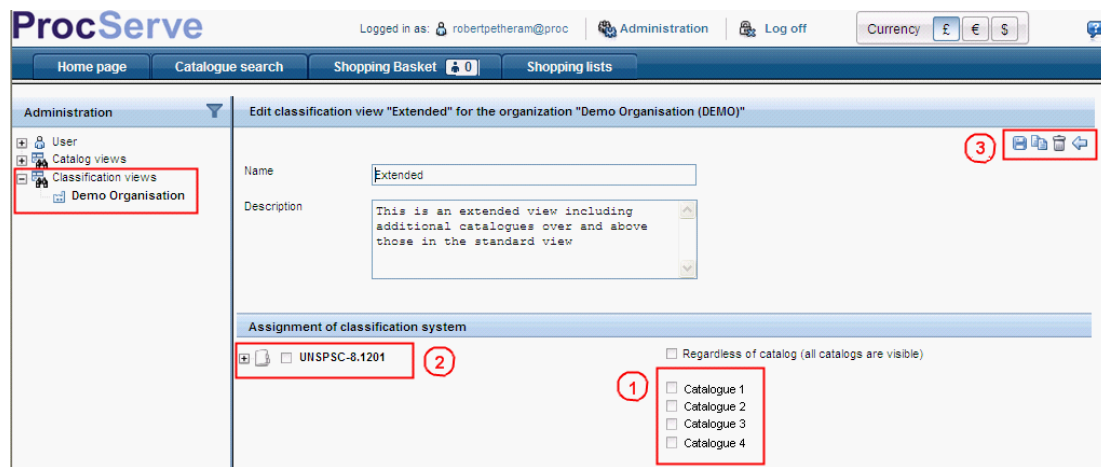


6. Enter a name and a description for the Classification view and click the Save icon:

For example:



7. Add the required catalogues to the view



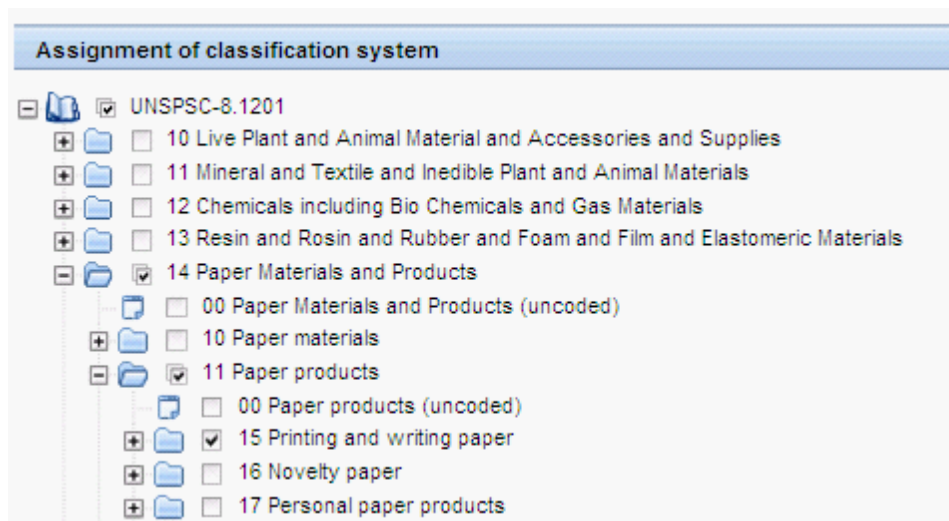
The following list describes how you use the above page to add classifications to your view:

(1) Catalogue Selection:

You can check one or more catalogues to make available in this view, for example

(2) Select Classification Groups:

You use the UNSPSC tree to locate and select classes to add to your view, for example:



You will also need to either set the catalogue selection to specific catalogues or "Regardless of catalog"

8. When complete click the save icon (3) and exit the marketplace

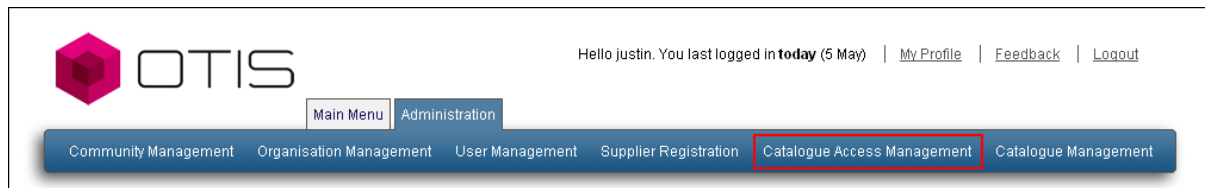
5.3 Administering Existing Classification Views

Overview

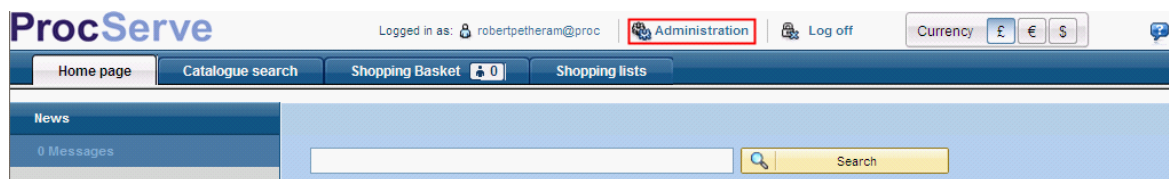
This section describes how you can amend classification views in the marketplace.

Administering Classification Views

1. Login to Zanzibar
2. Click on 'Administration'
3. Click on 'Catalogue Access Management'

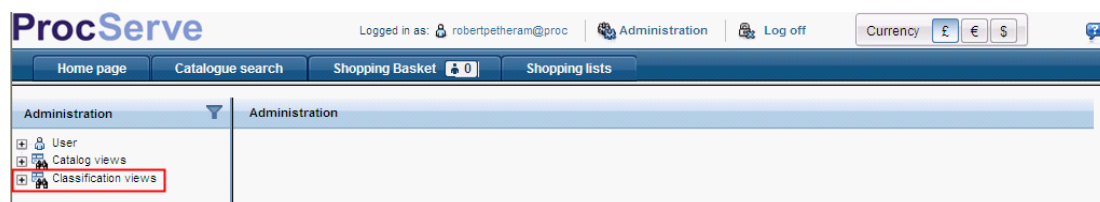


A new window will open and the Catalogue Home page is displayed:



4. Open Administration Module

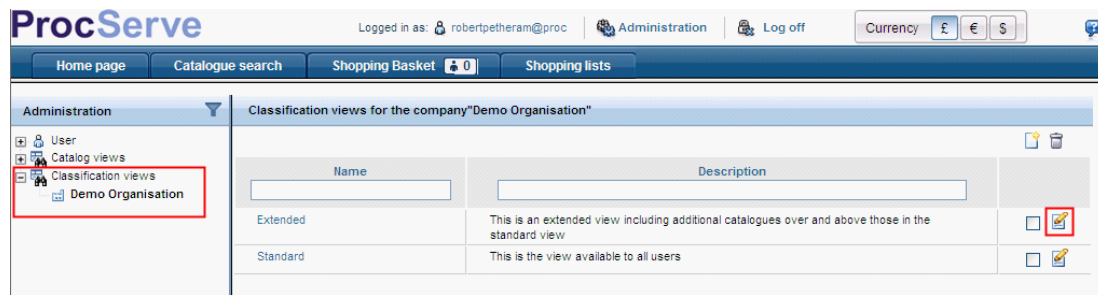
Click the Administration link as indicated in the above image. The Administration module is displayed:



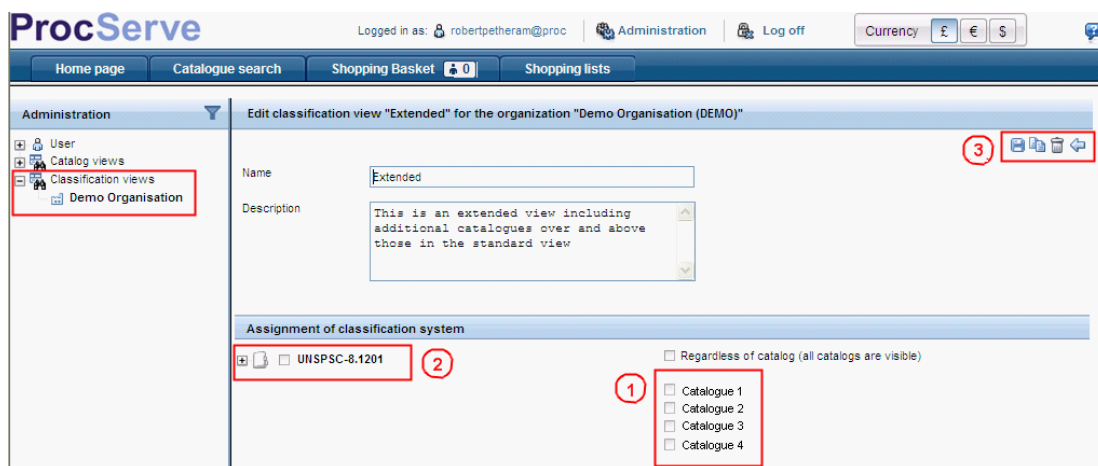
Note: You need special permissions to view the Administration module and some of its contents. If you cannot access the administration module and need to work with Classification views please contact your service support team.

5. Click on a Classification View to administer

To work with existing views you locate your organisation name in the tree and select. Details of existing classification views are loaded into the page shown below. You can delete or change existing views from here, the icon highlighted below is selected to change the corresponding view.

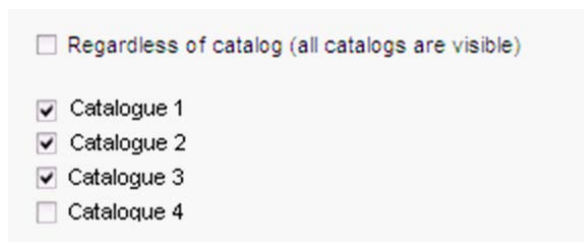


The following list describes how you use the above page to add or remove catalogues to your view:



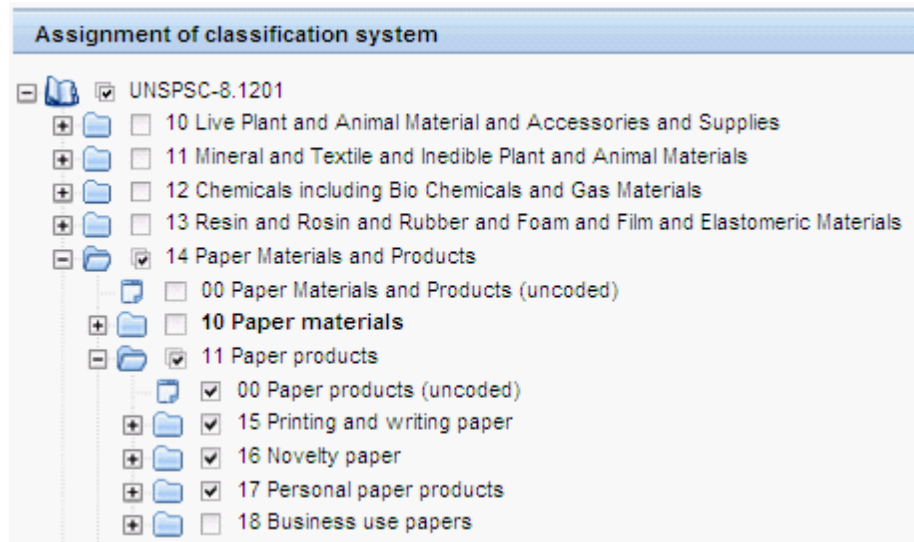
(1) Catalogue Selection:

You can check one or more catalogues to make available in this view or alternatively uncheck a catalogue to remove it from the view:



(2) Select Classification Groups:

You use the UNSPSC tree to locate and select or remove classes to add to your view, for example:



8. When complete click the save icon (3)

5.4 Updating the Search Index

Overview

This section describes how the search index updates once you have removed or changed a classification linked to a user.

Removing a View

Currently, when a classification is removed from a users view, the user will still be able to locate a removed item until the search index is rebuilt over night. The 'Checkout' button however will be removed so a user can not request those items.

Should a catalogue need removing urgently, the classification view can be taken away from the user and that catalogue can be re-exported using **Create Incrementally**. The function will only work for Private or Multibuyer catalogues.

6

Additional Information

6 Additional Information

6.1 About DUNS

A DUNS Number is a nine-digit code assigned by Dun & Bradstreet to identify unique business's separate and distinct operations.

There is no charge to obtain a D&B DUNS number for your business and it can make it easier for your customers to do business with you.

You can apply for a unique DUNS number on the Dun & Bradstreet website at: http://dbuk.dnb.com/Forms/DUNS_Request.asp

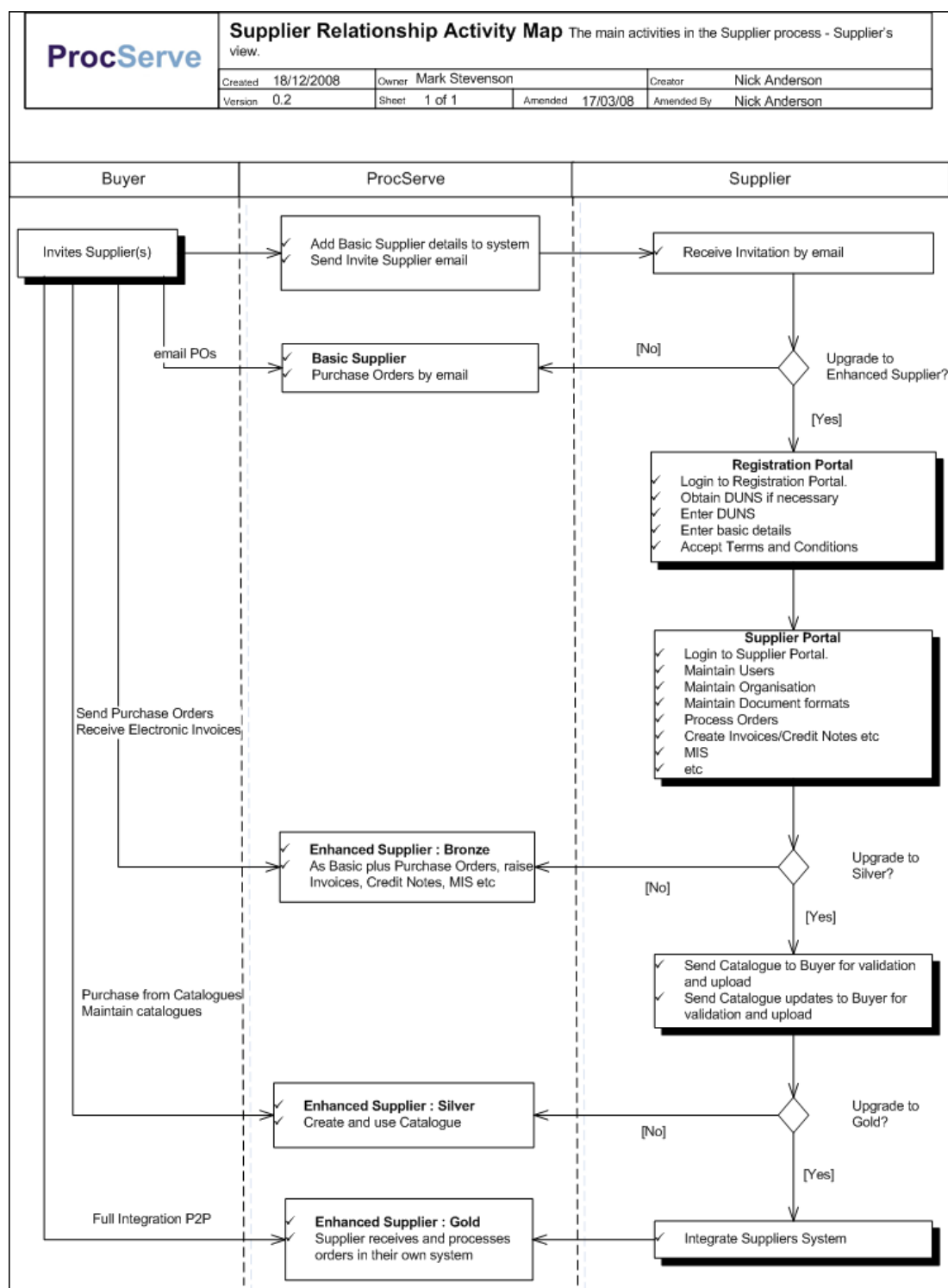
If you do not have one central sales order processing site, you will need to obtain a separate DUNS number for each ordering location. In this event, and to avoid misunderstanding, please check with your head office to determine which, (if any), DUNS number may have already been allocated.

The process for application to Dun & Bradstreet should take no longer than two weeks. You may wish to apply now if your Organisation does not already have a DUNS Number.

6.2 About ProcServe Suppliers and Buyers

This provides an overview of the supplier and buyer relationship. You can view a map that describes how the ProcServe Trading Network enables supplier and buyer activities.

The following image shows the activities for each type of Supplier:



The following list describes each activity in the above diagram:

- **Buyer: Invite Supplier(s).** Buyers invite suppliers to join the ProcServe network. by providing basic details such as a contact name and email address. These basic details will be loaded into our system.
- **Supplier: Receive Invitation emails.** Three emails are sent to the Supplier:
 - A welcome email containing basic instructions and a link to the Registration Portal.
 - An email containing your User ID for the Registration Portal.
 - An email containing your Password for the Registration Portal.
- **Supplier : Registration Portal.** As a basic supplier you can only receive orders as PDF attachments to emails from your clients. You can continue receiving your orders by email or you can go to the Registration Portal and register as a bronze enhanced Supplier.
- **Bronze Suppliers.** An bronze supplier can receive orders from buyers through the ProcServe Supplier Portal. Buyers will create requisitions that, when authorised are sent as orders to the supplier. Suppliers can receive orders and subject to validation and other checks can create invoices and credit notes automatically at the Supplier Portal. Suppliers can also access reports (MIS) about the documents and other work flow items.
- **Silver Suppliers.** Suppliers and buyers can work together to upload and make available catalogues that buyers can shop from and add items to requisitions. There is an initial phase of uploading, validating, configuring and releasing catalogues (including setting up authorisations). Once a catalogue is in use then updates can be made that are fully validated, checked and confirmed before being released. multi-buyer catalogues can be shared amongst several buying organisations and need to be configured slightly differently.
- **Gold Suppliers.** Gold suppliers connect their back office systems directly to the ProcServe Trading Network. This means they can process and respond to orders electronically in their own applications.

6.3 Catalogue Import Matrix































































This provides a list of the activities involved in catalogue import.

Key to table below:

Activities? ☒ Indicates that the Activity is relevant for the process. ☐ Indicates that the Activity is not relevant for the process.


Who Does What?  The Buyer does this.  The Supplier does this.  This may be automated.

The following table lists the activities (e.g. Create ProcServe Catalogue Builder) and processes (e.g. Single Buyer Update) involved in catalogue imports and indicates whether the activity is relevant for the process and who carries out the activity:

Activity	Single Buyer New	Multi-Buyer New	Single Buyer Update	Multi-Buyer Update	Images	Delivery charges
Create ProcServe Catalogue Builder (PCB)	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 
Import BMECat File	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/>  	<input checked="" type="checkbox"/>  	<input checked="" type="checkbox"/>  	<input checked="" type="checkbox"/>  
Check Validation Issues	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/>  
Supplier Admin Review and Approval	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/>  
Create Contract and Price File	<input type="checkbox"/>	<input checked="" type="checkbox"/> 	<input type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input type="checkbox"/> 	<input type="checkbox"/> 
Set Catalogue to Multi-Buyer	<input type="checkbox"/>	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Configure Process Profile	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setup Validation Rules	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Release Catalogue	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 
Notify all Organisations	<input type="checkbox"/>	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>
Buyer Review and Confirm	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 
Export Profile	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/>  	<input checked="" type="checkbox"/>  	<input checked="" type="checkbox"/> 

			 8			 8
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6.4 Quick Tips

BUYER PORTAL	Logging in to the portal	<ul style="list-style-type: none"> The password is case sensitive. Your account will be locked if you enter your password incorrectly 3 times
	Supplier directory	<ul style="list-style-type: none"> You can click the email field to send an email to us if you have a local mail program installed, for example Outlook. Click the download as vCard link to download the supplier details as a vCard. When you click the link a prompt will appear. You can save the vCard to your computer and import it onto your mail program later.
	Supplier management	<ul style="list-style-type: none"> The Top Targeted suppliers tab provides quick access to your most used Suppliers. Clicking the blue flag  will add the Supplier to the Top Targeted suppliers list. From here you can ensure that you focus your supplier adoption strategy on the suppliers that are more important to your organisation.
CATALOGUE	Opening the BMECat file	<ul style="list-style-type: none"> Excel Macros. If you have got macros turned off in Excel and you cannot open this file you will have to turn them on: Open Excel. Go to Tools (Menu bar) >> Options >> Security (Tab) >> Macro Security (Button). Select Medium security. Close Excel. When you open the ProcServe Catalogue Builder you will need to select enable macros from the prompt.
	BMECat file loading	<ul style="list-style-type: none"> You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.
	Removing catalogues	<ul style="list-style-type: none"> Catalogues cannot be deleted. If you want to remove the catalogue so it's no longer viewable, use the Export Revoke functionality.
	Exporting your catalogue profile (single and multibuyer catalogues)	<ul style="list-style-type: none"> It is advised that the export of catalogue updates is scheduled for out of business hours as this will prevent the catalogue from disappearing from a user's view. The time stated in the export profile determines the time updated catalogue is exported. This does not affect the initial catalogue as this is scheduled manually in the export schedule. When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC tree structure until the search index. The search index is scheduled to run 23:00 daily. Once this is complete you can use the keyword search to find items. Therefore it is recommended automatic export is scheduled to run after hours but before 21:00 (just allow enough time for the export to run – depending on the size of the catalogue, the export time will vary). Use 24hr clock (14:00 instead of 2:00) when scheduling a catalogue export. A date CANNOT be entered in the export Profile of a catalogue. If you want to export a catalogue on a specific date then this must be entered in the export schedule. For catalogue updates Only: If a time is entered in the export Profile, the catalogue will export at the specified time automatically once it has been approved by the buyer. The export schedule is used for the initial catalogue export. The initial catalogue export should be run immediately.
	Loading catalogue with images	<ul style="list-style-type: none"> If you are uploading images you should perform the image upload before the catalogue is exported. You can use jpeg, png and gif image formats. Each individual image needs to be a reasonable size (for example under 100kb). The catalogue system does not resize images. Images are displayed as thumbnails in the Marketplace therefore having large images will only take a while to load on the page. The image name and extension must match that in the PCB. All images must be zipped before they are uploaded.

		<ul style="list-style-type: none"> The Zip file when opened should only display a list of images and nothing else. If you open a Zip file and see another folder in this file, the images will not load. The catalogue system looks to extract the image files from the zip but will be unable to find them if they are hidden within a folder.
	Catalogue with expiry dates	<ul style="list-style-type: none"> Items entered with a expiry date will automatically be removed from the system when they reach their expiry date. Suppliers should use offline reminders to ensure a revised catalogue is loaded in time.
	Validation Profiles	<ul style="list-style-type: none"> The PCB will check for many errors, therefore it may not be necessary to set a validation rule to Error. Choose the 'Error' evaluation wisely! It may be useful to standardise validation rules across your catalogues or certain commodities. Changing a Validation Rule will apply across all catalogues and therefore should not be amended. If you require a specific rule, create a new rule.
	Process Profiles	<ul style="list-style-type: none"> Process profiles cannot be copied. For Multi Buyer Catalogues - amending the Process Profile will affect all buying organisations.

SHOPPING	Basket	<ul style="list-style-type: none"> Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.
	Comparing items	<ul style="list-style-type: none"> You can keep adding items to the comparison list until you are ready to compare. So you can switch between the compare items list and the window you were shopping in.
	RFQ	<ul style="list-style-type: none"> In the RFQ overview page if the open RFQs list is empty you can click the create a new RFQ link to display the wizard. When the open RFQs list is empty the create a new RFQ link is displayed. You can click this link to start the create new RFQ wizard.
	Searching	<ul style="list-style-type: none"> When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has run. The search index runs daily at 23:00. Once this is complete you can use the keyword search to find items. If you know the manufacturer's number, use this as a starting point. Try to be more specific when putting in search terms (if you want to look for A4 paper then do not search for paper as this term is too wide). If you have a catalogue number then use this as a search term. If you want to search for a product from a particular supplier then use the advanced search functionality. If you see a result that looks as if it shouldn't have been returned, look at the item in detail as the search term will be in one of the other fields. Use the slider bar to vary the way the system searches across the searchable fields. If you have a word that is made of two separate words (e.g. earplugs) break it down into individual words (e.g. ear plugs). Searched words can appear in any order within any of the searchable fields. If you know a product in a particular way (e.g. packing tape) and you get no results when searching, try searching for variations (e.g. parcel tape). If you have problems finding supplier catalogues or products and have exhausted all other tips and hints, please call or email the ProcServe service desk. Do not try to search for words such as <i>a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, their, the, then, there, these, they, this, to, was, will, with</i> etc. as they will be excluded from the search. If you need further help or guidance, please use the online help

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6.5 Troubleshooting

I cannot find a supplier in the supplier directory	Try changing search term as the organisation may have registered their full name or with a different abbreviation.
	Try searching by the supplier's DUNS.
	Contact the supplier to confirm their details.
I don't understand why I am getting some results in my supplier directory search	The search does not only run on the supplier name other information the supplier provides such as whether they provide recycled goods is also searched against.
I cannot delete a user	You will not be able to delete users due to audit requirements however you should disable any user accounts that are no longer required.
I cannot see the private catalogues that I am loading in my classification view	Confirm that the catalogue was imported against your organisation by checking the header in the catalogue builder matches exactly the organisation in the portal.
	Confirm that the catalogue management system export was successful.
	Contact ProcServe helpdesk to ensure the correct assigned buyer has been set.
My shopping cart has contents in it that I didn't add	Some organisations will have requested to have shopping carts saved if the user closes the session without checking out therefore if you did this last time that will be why items are in the cart.
I cannot find the same products as my colleague	The solution supports what are known as classification views which control what content can be seen by different users which would explain why you cant see what someone else can if you have different views assigned.
I have loaded a catalogue and have assigned to a classification view but my users cannot see the items within the marketplace	The item will be searchable using the UNSPSC structure, however you will need to wait for the search index to run for your users to find the item using the standard search feature.

How can I find a item which has a " / " in the description?	<p>If you are searching for an item with a " / " eg 26/6 Staples, the / is ignored by the search engine. This means that when you search for "26/6 staples" the search engine searches for "26 6 staples", which means that 26/6 staples are not found. To overcome this, use the search term "26?6 staples" as the ? denotes any one character.</p>
I wish to add additional buyers to an existing catalogue	<p>Symptoms: If you have asked the Service Desk to add additional buyers to a multi-buyer catalogue that has already reached 'Update Expected' the Catalogue may go to "Supplier Review - Please solve all errors!" and all the items marked will be marked as 'Errors'.</p> <p>Cause: This is an expected system state as the Catalogue will be waiting for a price file for the new buyer.</p> <p>Resolution: Load a price file for the new buyer and click 'Validate' to clear the errors. This will move the task onto "Release the Catalogue" and continue following the process in the normal way until its reached "Update Expected" again.</p>

6.6 Glossary

The glossary provides a list of terms and definitions used in the system.

Term	Description
AID (Re ProcServe catalogue Search)	Article ID. The item number.
Approval Plan (re P2P)	A list of business rules defining what happens to either a requisition or purchase order after it is submitted by a user. Approval Plans contain approval criteria and notification controls.
Assortment catalogue (re ProcServe Catalogue Manager)	(See also Buyer Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of an Assortment Catalogue is defined, the item data is not copied but referenced to the original source Catalogue.
Audit Trail (re P2P)	A list of all actions that occur during the processing of a requisition or purchase order that ProcServe Purchase to Pay records and automatically time and date stamps, which is visible to all the parties who have permission to view the order.
BASDA	Business Application Software Developers Association.
BME (Re ProcServe Catalogue Builder & ProcServe Catalogue Manager)	The Bundesverband Materialwirtschaft, Einkauf und Logistik . (The Federal Association for Material Management, Purchasing and Logistics, based in Frankfurt Germany.)
BMEcat	BMEcat data format is a widely used international standard for the exchange of product data catalogues between Supplier and purchasing Organisations. This standard is used by the ProcServe Trading Network for the creation and exchange of Catalogue data within the ProcServe Catalogue Builder, ProcServe Catalogue Manager and ProcServe Catalogue Search. {Web: http://bmecat.de }
Browser	The user interface to the ProcServe Trading Network is through your standard Web browser (example Microsoft Internet Explorer or Netscape Navigator).

Term	Description
Buyer Catalogue (Re ProcServe Catalogue Manager)	(See also Assortment Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of a Buyer Catalogue is defined, the item data is not copied but referenced to the original Source Catalogue.
Catalogue Context (Re ProcServe Catalogue Manager)	The selection of a Catalogue with which it is intended to work.
Catalogue Edition (Re ProcServe Catalogue Manager)	Editions are used so that the history of a Catalogue can be managed coherently. A Catalogue always has one current edition, in which changes, validations and other operations are made and is identified with a name and description. There can be multiple versions of each edition.
Catalogue Status (Re ProcServe Catalogue Manager)	Provides information about the process steps that are currently being carried out within the Catalogue.
Catalogue Version (Re ProcServe Catalogue Manager)	Several versions can exist of one Catalogue edition. The version number is incremented from within the Catalogue edition and is usually used to record a major revision to the data. Catalogue Versions can be created manually and are also created automatically before each import.
Check Data (re ProcServe Catalogue Builder)	The process of running macros to test and validate Catalogue data in the ProcServe Catalogue Builder before the creation of the BMEcat file.
Class Code	The product classification code associated to an item. It is mandatory in ProcServe Trading Network catalogues that all items are coded to the UNSPSC.
Cookie	A cookie is a small piece of data which is sent from a website to a web browser and stored locally on a users PC. The use of cookies enables a Web site to become more interactive with its users. The ProcServe Trading Network uses session cookies to ensure that a user is recognised when they move from page to page within the Marketplace and that any information entered is remembered. Unlike normal cookies, session cookies are deleted from the users PC when they log out.
CPV	Common Procurement Vocabulary. A product classification system derived from the UN Common Procurement Classification and adopted as an EU standard. Used for public procurement and public sector reporting and used to drive OJEU Notices. {Web: http://www.simap.eu.int }

Term	Description
CSV	Comma Separated Value. A flat file format sometimes used for data import or export.
cXML	Commerce eXtensible Mark-up Language. (see also XML). A standard, defining acceptable formats and content, for sending documents by electronic means.
Data Key	The individual or combined elements or properties of data that are used to determine the uniqueness of a Catalogue item.
DUNS Numbers	Dun and Bradstreet Number. DUNS numbers (or correctly D-U-N-S Numbers) are issued, owned and solely maintained by Dun & Bradstreet Corporation and are used in the main for credit risk management and corporate authentication. The DUNS Number is a unique nine-digit identification sequence, which provides unique identifiers of single business entities, while linking corporate family structures together. When a business is entered into the D&B business information database each distinct business location that it has, is assigned its own DUNS Number.
EAN	European Article Numbering. Widely used bar code symbology used for product marking. Two versions of EAN exist. (See also UPC.) The EAN system is managed worldwide by EAN International {Web: http://www.ean-int.org }
eBis	Electronic Business Interchange Standard (see XML). A standard, defining acceptable formats and content, for sending documents by electronic means.
EBP	SAP Enterprise Buyer Professional. A procurement application which can be integrated for use as the P2P system within the ProcServe Trading Network.
eClass	A product classification system that has been developed to enable products, materials, merchandise and services to be organised in a logical structure. The system has four hierarchical levels. The highest level consists of 22 technical domains, which are divided into main groups, groups, and subgroups as leaf product classes. Each level is identified by a two-digit number, so that each subgroup can be identified by its eight-digit class number.
eForm	A document held electronically.

Term	Description
ERP	Enterprise Resource Planning systems. (Example: Oracle, JD Edwards, SAP, or Peoplesoft) An industry term for the broad set of activities supported by multi-module application software that helps a manufacturer or other businesses manage the important parts of their business, including product planning, parts purchasing, maintaining inventories, interacting with Suppliers, providing customer service, and tracking orders. ERP can also include application modules for the finance and human resources aspects of a business. Typically, an ERP system uses or is integrated with a relational database system. The ProcServe Trading Network can integrate information into these systems.
ERS	Evaluated Receipt.
ETIM	Electrotechnical Information Model. A classification scheme for the electrical and electronics industry.
EUR	Euro (currency).
Explicit Item List (Re ProcServe Catalogue Manager)	An explicit item list is a list of items that is specifically included in or excluded from an assortment Catalogue.
FMS	Financial Management System.
FTR	Free Text Requisition.
Free Text Items	(see also Non-Catalogue Items). Goods or services added to a requisition which are not included in a Catalogue.
GBP	Great British Pounds (currency).
GPC	Government Procurement Card.
GTIN	Global Trade Identification Number. Generic term representing a family of global data structures including EAN, UCC and UPC.
Key	A database identification field not usually used in the GUI that uniquely identifies a data element.
LAN	Local Area Network. Usually your computer is attached to other computers and servers that reside internally within your Organisation. This is your organisation's LAN.
Lock(ed) Out	The inability of a user to login to the ProcServe Trading Network due to the freezing of their user account. A lockout occurs after 3 failed login attempts.

Term	Description
Mass Edit (Re ProcServe Catalogue Manager)	The process of editing multiple items in a single operation.
Merchant Capacity	The Merchant Capacity indicates what level of VAT detail on purchases the merchant is able to provide to the buying Organisation. It should only be selected where Payments Accepted = Credit Card. The Merchant Capacity levels are 0 = does not accept credit cards; 1 = provides basic VAT information; 2 = provides Summary VAT information; 3 = provide Line Item Detail. In order to receive either Level 2 or Level 3 VAT information the buying Organisation must use a Purchase Card; Purchase Cards are only available to public sector Organisations.
MRO	Maintenance, Repair, and Operations. Products and services that Organisations must obtain to run their day-to-day business operations.
Multiple Buyer Catalogue (re ProcServe Catalogue Manager)	(See also Source Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Multiple Buyer Catalogues are not exported to ProcServe Catalogue Search.
Non-Catalogue Items	(see also Free Text Items). Goods or services added to a requisition that are not included in a Catalogue.
NSV	National Supplies Vocabulary. Product classification code originally developed by the NHS and used as a standard in UK government. Managed by Coding International {Web: http://codingit.co.uk }
OCI	Open Catalogue Interface. Used by SAP EBP applications to communicate with external Catalogue systems (eg ProcServe Catalogue Search).
OGC	Office of Government Commerce. The Office of Government Commerce is an independent office of the Treasury and works with public sector Organisations to help them improve their efficiency, gain better value for money from their commercial activities and deliver improved success from programmes and projects. {Web: http://www.ogc.gov.uk }
Buying Solutions	Buying Solutions is the trading arm of the Office of Government Commerce, which is itself an office of HM Treasury. It provides public sector procurement professionals with a route to the products and services they need to maximise procurement efficiency and value for money. Its contracts and framework agreements offer substantial savings through significant buying power, economies of scale

Term	Description
	<p>and strategic partnerships.</p> <p>Rigorous tendering and evaluation processes ensure that products and services are checked for quality, price competitiveness, fitness for purpose and compliance with statutory requirements. These products and services are available through Buying Solutions framework agreements, managed services and other procurement arrangements.</p> <p>More details are available on the website: http://online.ogcbuyingsolutions.gov.uk</p>
OJEU	Official Journal of the European Union.
OPEN	Online Procurement for Education Needs. An eProcurement Marketplace solution designed specifically for schools.
P2P	Purchase to Pay or Procure to Pay. The procurement application used to connect to ProcServe Catalogue Search. The P2P used within the ProcServe Trading Network environment is ProcServe P2P.
PA Consulting	PA Consulting. PA Consulting Group is a leading management, systems and technology consulting firm. {Web: http://www.paconsulting.com }
Parametric Search	A method of searching catalogues that enables the user to define values for certain Catalogue fields. ProcServe Catalogue Search returns a list of items that match the search criteria.
PDF	Adobe Portable Document Format. A format that allows the conversion of virtually any document in virtually any application to be universally distributed read and stored.
Private Catalogue	Where a Supplier provides a Catalogue to a single buying Organisation under contract or agreement with that buying Organisation.
Process Profile (Re ProcServe Catalogue Manager)	The entire management process from import to release of data. Standard processes distribute tasks to responsible users and can automatically start operations like Catalogue exports.
Procurement Cards	In some buying Organisations, credit or charge cards which are used for purchasing supplies. (Also known as Purchasing Cards or GPC's)

Term	Description
ProcServe Catalogue Builder (PCB)	The PCB is a Microsoft Excel spreadsheet used to contain data that defines catalogues and Catalogue item data. A macro (Check Data) can be run to check that the data is correctly formed. Once data has been checked a BMECat file (q.v.) can be generated. The BMECat file can then be imported onto the Catalogue Management system.
Public Catalogue	Where a Supplier provides a Catalogue for use by multiple buying Organisations under contract or agreement with Buying Solutions
Recurring Requisition	(see also Shopping Lists). A saved list of regularly purchased items. A recurring requisition can be used to add items to a requisition instead of searching catalogues.
Requisition (re P2P)	Request for purchase, which may consist of items from various Suppliers, grouped and ready to submit for approval or ordering. A requisition is usually converted into a Purchase Order, during or after approval.
RFQ	Request for Quote.
RMA	Return Material Authorisation. The generic term for a returns number issued by a Supplier under which goods are to be returned.
SAID (Re ProcServe Catalogue Search)	Supplier Article ID
Scrolling	If a list or page contents extends to. over a single page display, it is possible to scroll vertically or horizontally to read the hidden page content.
Search Engine	A tool which enables a user to search for items or documents based on information that they enter. A search engine returns a list of results which meet the search criteria.
SGML	Standard Generalised Mark-up Language.
Shopping Basket	The term used in ProcServe Catalogue Search to refer to a list of items that an individual is buying and wishes to return to their P2P application. The Basket is sometimes referred to as a "Cart". In the P2P application a Shopping Cart is usually converted into, or added to a Requisition.
Shopping List	A saved list of items for adding to a Shopping List in ProcServe Catalogue Search. Shopping Lists can be used as templates or skeleton orders to avoid the need for searching catalogues.

Term	Description
Source Catalogue (re ProcServe Catalogue Manager)	(See also Multiple Buyer Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Source Catalogues are not exported to ProcServe Catalogue Search.
Source File	The relative path and name or URL of a file.
SQL	Structured Query Language. A language used to obtain data from or modify data in a relational database.
SSO	Single Sign On.
Standard Supplier Catalogue (re ProcServe Catalogue Manager)	A Catalogue provided by a single Supplier which is associated with exactly one buying Organisation. A Standard Catalogue is exported to ProcServe Catalogue Search.
Target System (Re ProcServe Catalogue Manager)	The directory to which an exported Catalogue file is to be copied.
Thumbnail	A small preview of an image.
UCC	Uniform Code Council. (Also known as GS1US) The Organisation appointed by the UNDP as the code manager responsible for managing the UNSPSC Classification scheme. The code manager is responsible for ensuring compliance with the principles of the UNSPSC as well as the integrity of the code schema. The UCC is responsible for overseeing code change requests, industry revision projects, issuing regularly scheduled updates to the Code, communications with members, as well as special projects and initiatives as determined both by the UNDP and member requests {Web: http://www.gs1us.org and http://www.uc-council.org }.
UNDP	United Nations Development Program. The UNDP own all rights to the UNSPSC and appointed the Uniform Code Council (UCC) as code manager (Web: http://www.undp.org).
UNECE	United Nations Economic Commission for Europe.
UNECE Recommendation 20	The unit of purchase used in the ProcServe Trading Network. {Web: http://www.unece.org }

Term	Description
UNSPSC	United Nations Standard Products and Services Code. An international standard product classification code structure developed jointly by the UNDP and D&B. Preferred classification code of the OGC and the mandatory classification system for the ProcServe Trading Network. (Web: http://www.unspsc.org).
UOM	Unit of Measure. Referred to in the ProcServe Trading Network as the Unit of Purchase. (See also UNECE Recommendation 20)
UPC	Universal Product Code. Widely used bar code symbology developed originally by the grocery industry, used for product marking. Five versions of UPC exist. (See also EAN.) An online database for UPC codes exists at: http://www.upcdatabase.com .
URL	Uniform resource Locator. An internet address.
USD	United States Dollar (Currency).
Validation Rule (Re ProcServe Catalogue Manager)	A specific validation test for testing the quality of data. Validation Rules are grouped together to form Validation Profiles which can be associated with a Catalogue or Organisation.
VAT	Value Added Tax.
XML	Extensible Mark-up Language (see also cXML). A type of web page that allows large amounts of data to be shipped across the internet in a compact format while retaining the information in distinct fields, that can be used for integration with a database.
Zanzibar Managed Service	The Zanzibar Managed Service is the UK public sector eProcurement managed service delivered by ProcServe. It is available under a framework agreement to all English, Wales and Northern Irish public sector Organisations. Zanzibar is a web-based purchase to pay (P2P) and electronic Marketplace solution, It provides a common hosted platform for ePurchasing and eInvoicing.
ProcServe Catalogue Manager	The ProcServe Trading Network Catalogue Content Management System. The application into which the BMEcat file is imported for the creation, management and approval of Supplier catalogues. Catalogues are exported from ProcServe Catalogue Manager to ProcServe Catalogue Search.
ProcServe Catalogue Search	ProcServe Trading Network catalogue system. The application into which catalogues are imported from ProcServe Catalogue Manager, where they are hosted for

Term	Description
	P2P and ERP systems to access.
ZIP File	A file that has been compressed for ease of transmission.
ZMP Forum	Zanzibar Marketplace Forum.

